CallRail

6 ways to prepare your business for AI in 2026

Marketing budgets are on the rise in 2026. In a recent CallRail survey of 600 small-to-midsize businesses, **64% said they expect their marketing budget to increase in 2026**, even as competition, rapid technology change, and follow-up gaps persist[1]. AI is already widely used beyond just content creation, but many teams still struggle with missed calls, disconnected lead data, and unclear revenue reporting — areas where AI can have the biggest impact when applied across the full lead lifecycle.

Use this six-step checklist to assess how ready your team is to use AI effectively across the full lead lifecycle in 2026.

01

Align on goals & "good leads" for your business (or clients)

AI and measurement only work when they are tied to outcomes that matter to your business or your clients. Before investing in new tools or automation, teams need shared clarity on priorities and what success actually looks like. Clear goals and lead definitions set the foundation for accurate tracking, smarter use of AI, and reporting that shows real impact, not just activity.

What to do next

- ☐ List your top three business goals for 2026 how marketing will contribute to each.
- ☐ Define what a "good" or qualified lead looks like for each key service, offer, or client.
- ☐ Align these definitions across your team or with clients so success is measured consistently.

02

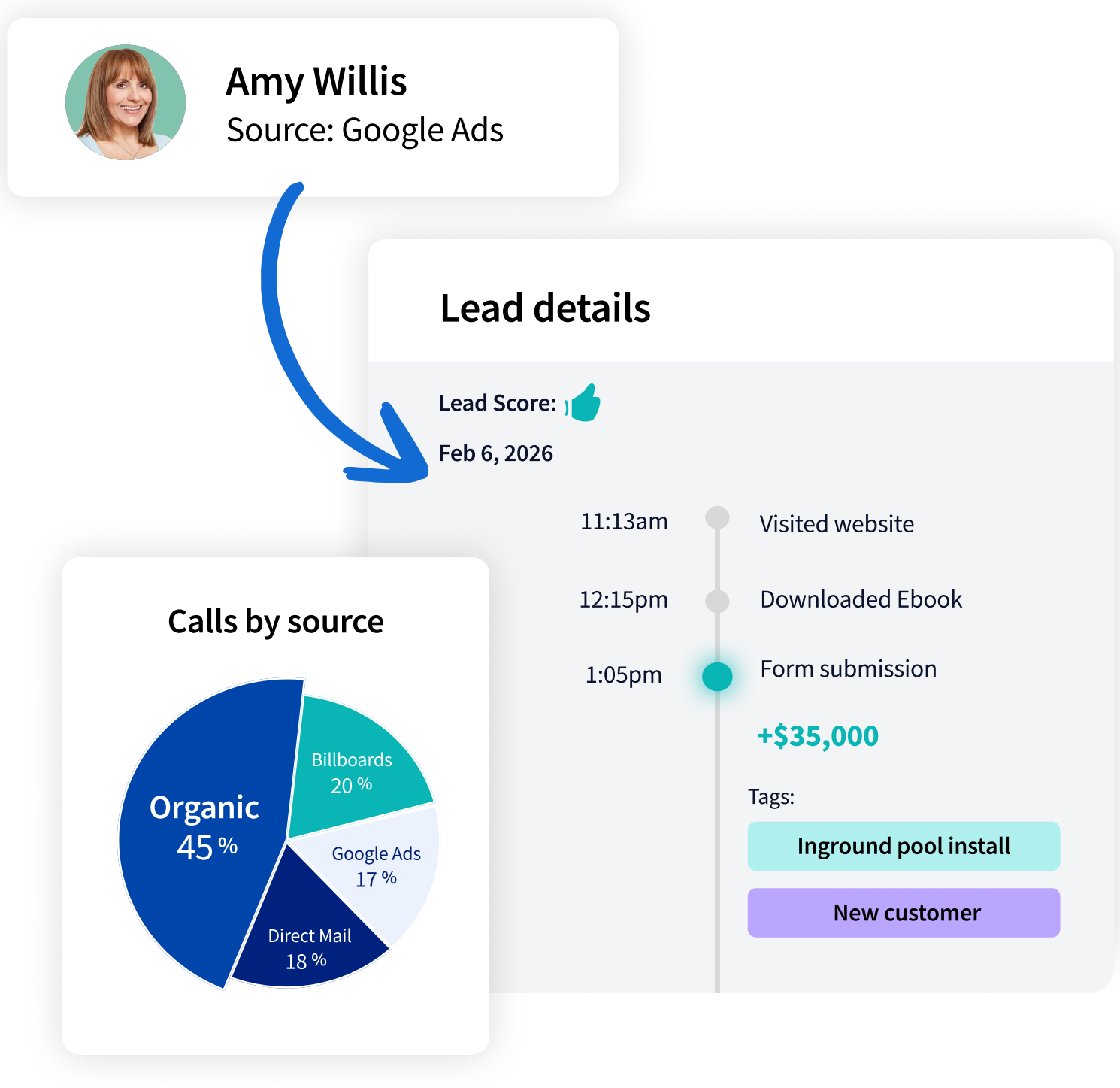
Track every lead touchpoint for full-funnel attribution

To understand what is driving results, teams need visibility into calls, forms, texts, and chats. CallRail research shows that Paid Search (**#1**), Video (**#2**), SEO (**#3**), Paid Social (**#4**), and Content (**#5**) drive the most new business, but without consistent tracking, teams cannot prove which channels deliver their most valuable customers. Clear, cross-channel attribution makes it easier to invest, optimize, and report with confidence.

What to do next:

- ☐ Audit how you currently track calls, forms, texts, chats, and other inbound leads.
- ☐ Turn on or tighten tracking for your top three lead-driving channels.
- ☐ Make sure every source and campaign is tagged from first touch to closed deal.

Tools: Call Tracking | Form Tracking



Amy Willis
Source: Google Ads

Lead details
Lead Score:
Feb 6, 2026
11:13am Visited website
12:15pm Downloaded Ebook
1:05pm Form submission
+$35,000
Tags:
Inground pool install
New customer

Calls by source

03

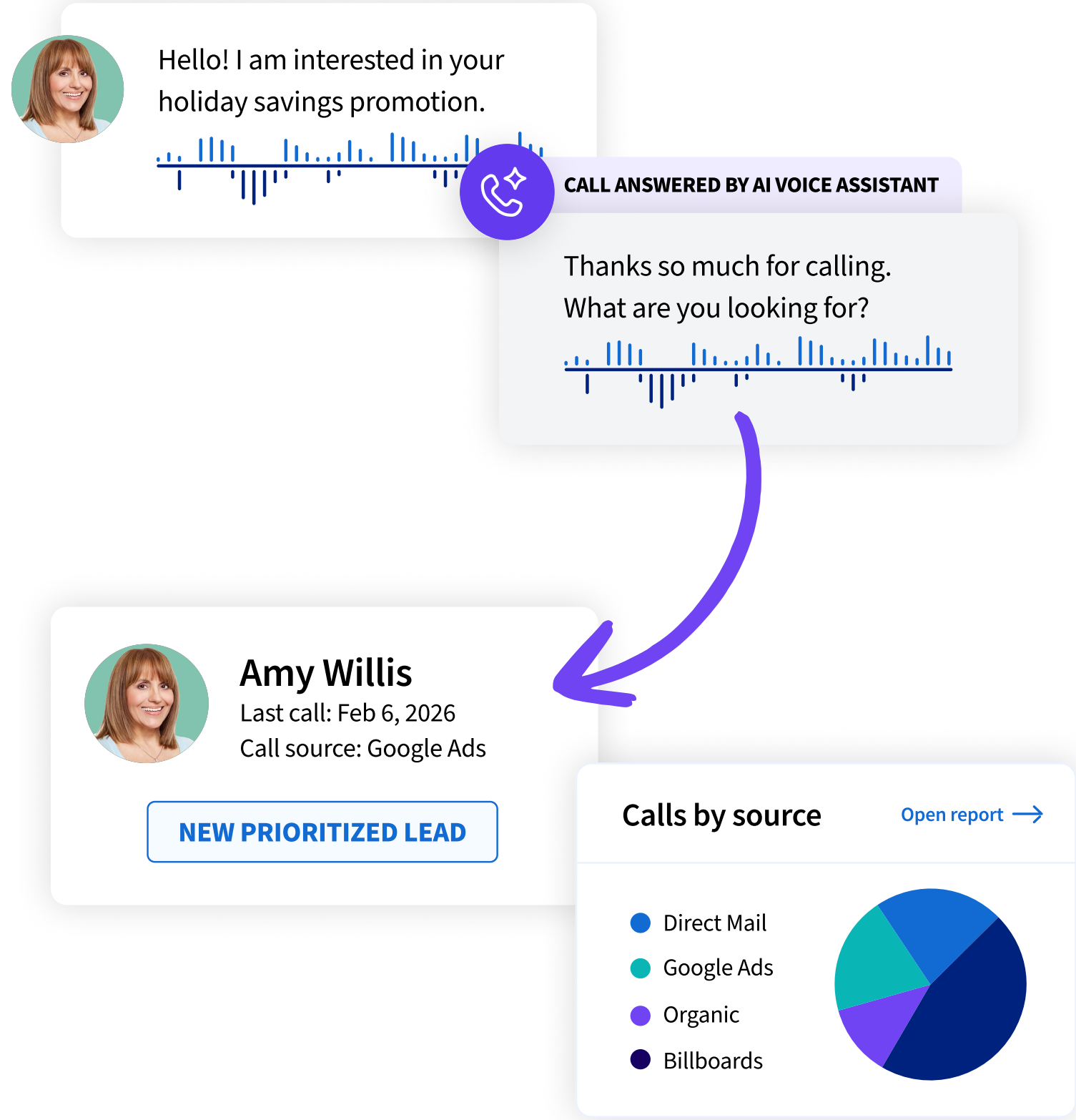
Automate lead capture with AI so you don't waste budget on missed calls

Missed and after-hours calls waste marketing spend. CallRail research shows that only **59% of SMBs receive immediate missed call alerts**, meaning many potential customers aren't followed up with quickly, if at all. An AI-powered voice assistant can handle calls right away, helping protect ad spend and improve customer experience.

What to do next:

- ☐ Identify when calls are most often missed, such as nights, weekends, or busy seasons.
- ☐ Decide where an AI voice assistant should handle overflow or after-hours calls first.
- ☐ Define which key lead details the voice assistant should capture, including who the caller is, their needs, and any qualifying or next-step information.

Tools: Voice Assist



Hello! I am interested in your holiday savings promotion.

CALL ANSWERED BY AI VOICE ASSISTANT

Thanks so much for calling. What are you looking for?

Amy Willis
Last call: Feb 6, 2026
Call source: Google Ads
NEW PRIORITIZED LEAD

Calls by source
Open report →

04

Plug funnel leaks with better follow-up and coaching

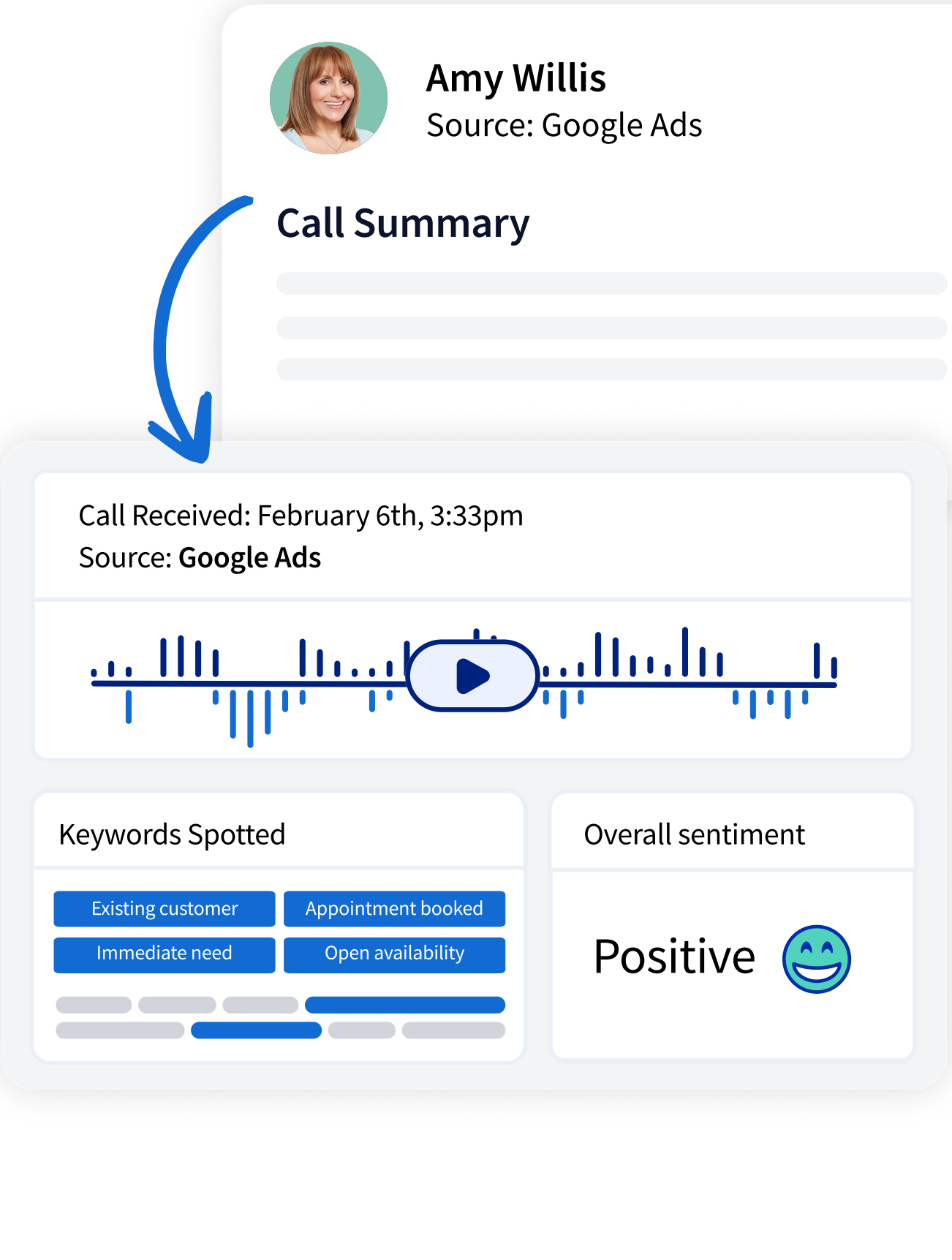
Lead follow-up and conversion remain major operational challenges for many teams. CallRail research shows that **62% of businesses cite follow-up and lead conversion as key issues,** while **63% point to gaps in sales and customer service training.** Faster response times help, but consistency, visibility, and coaching are just as critical to improving outcomes.

AI-powered conversation insights make it easier to see where leads fall through and to coach teams using actual customer conversations.

What to do next:

- ☐ Create a process to regularly review a sample of recent calls or transcripts.
- ☐ Set clear standards for response times and follow-up steps by lead type.
- ☐ Use AI summaries or scoring to coach teams toward better outcomes.

Tools: Premium Conversation Intelligence™



Amy Willis
Source: Google Ads
Call Summary

Call Received: February 6th, 3:33pm
Source: **Google Ads**

Keywords Spotted
Existing customer | Appointment booked | Immediate need | Open availability

Overall sentiment
Positive

05

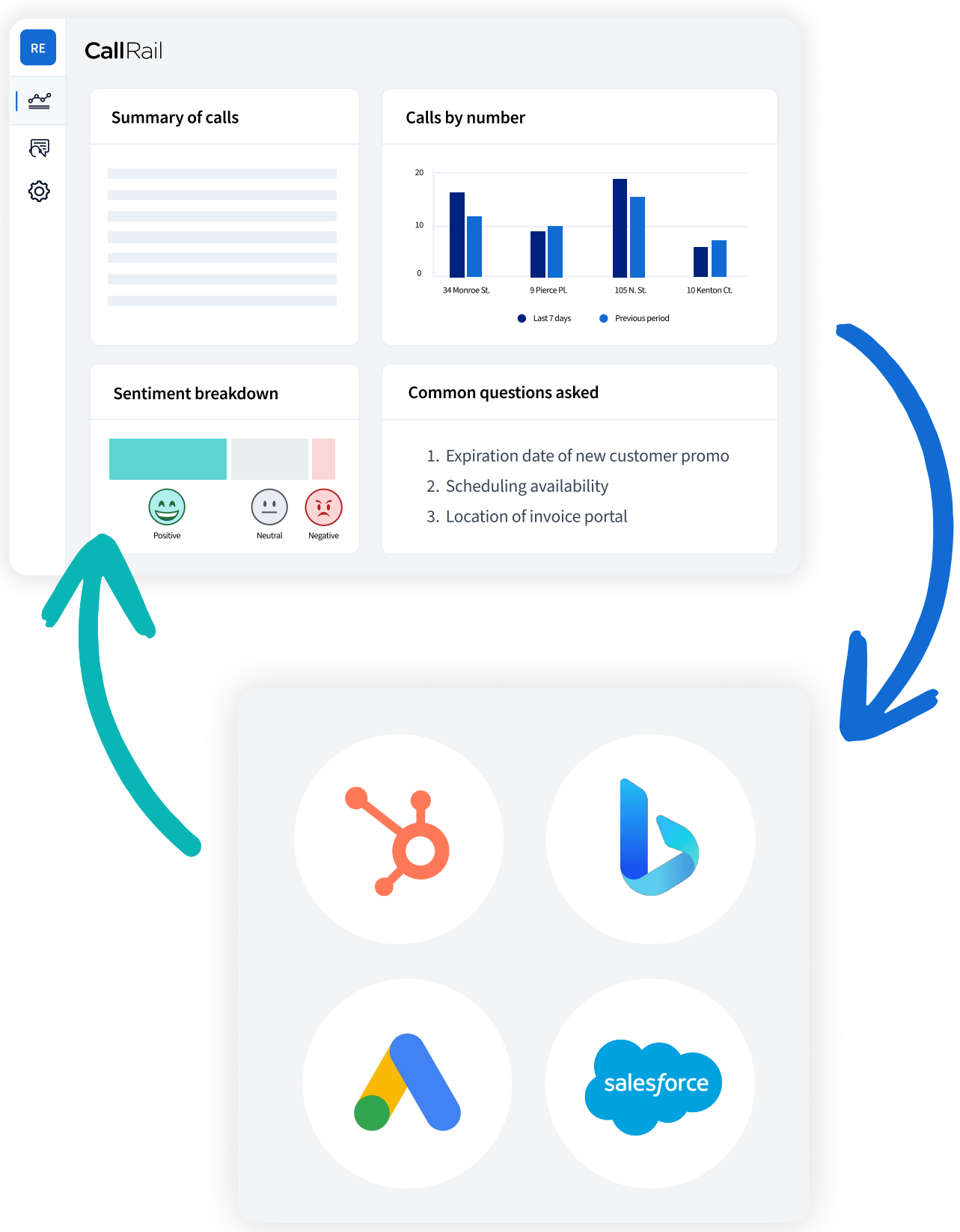
Connect your stack and reporting so AI's impact is clear

When lead data lives in disconnected systems, it becomes harder to answer basic questions like which campaigns drive your best leads or whether AI is improving results. While **51% of businesses say they are extremely confident** and **41% moderately confident** that they know which channels generate their best customers, that confidence is only as strong as the data behind it. Clean, connected data ensures marketing, sales, and leadership are working from the same view of performance.

Integrations are not about adding more tools. They reduce manual work, improve attribution, and make reporting clearer and more consistent.

What to do next:

- ☐ List the two to three systems you rely on most, such as your CRM, marketing platform, or ad accounts.
- ☐ Ensure call, form, and conversion data flows into those systems automatically.
- ☐ Build customer-ready reports for key metrics, such as cost per qualified lead, source ROI, and lead quality, and schedule them for regular delivery.



CallRail
Summary of calls
Calls by number
Sentiment breakdown
Common questions asked
1. Expiration date of new customer promo
2. Scheduling availability
3. Location of invoice portal

06

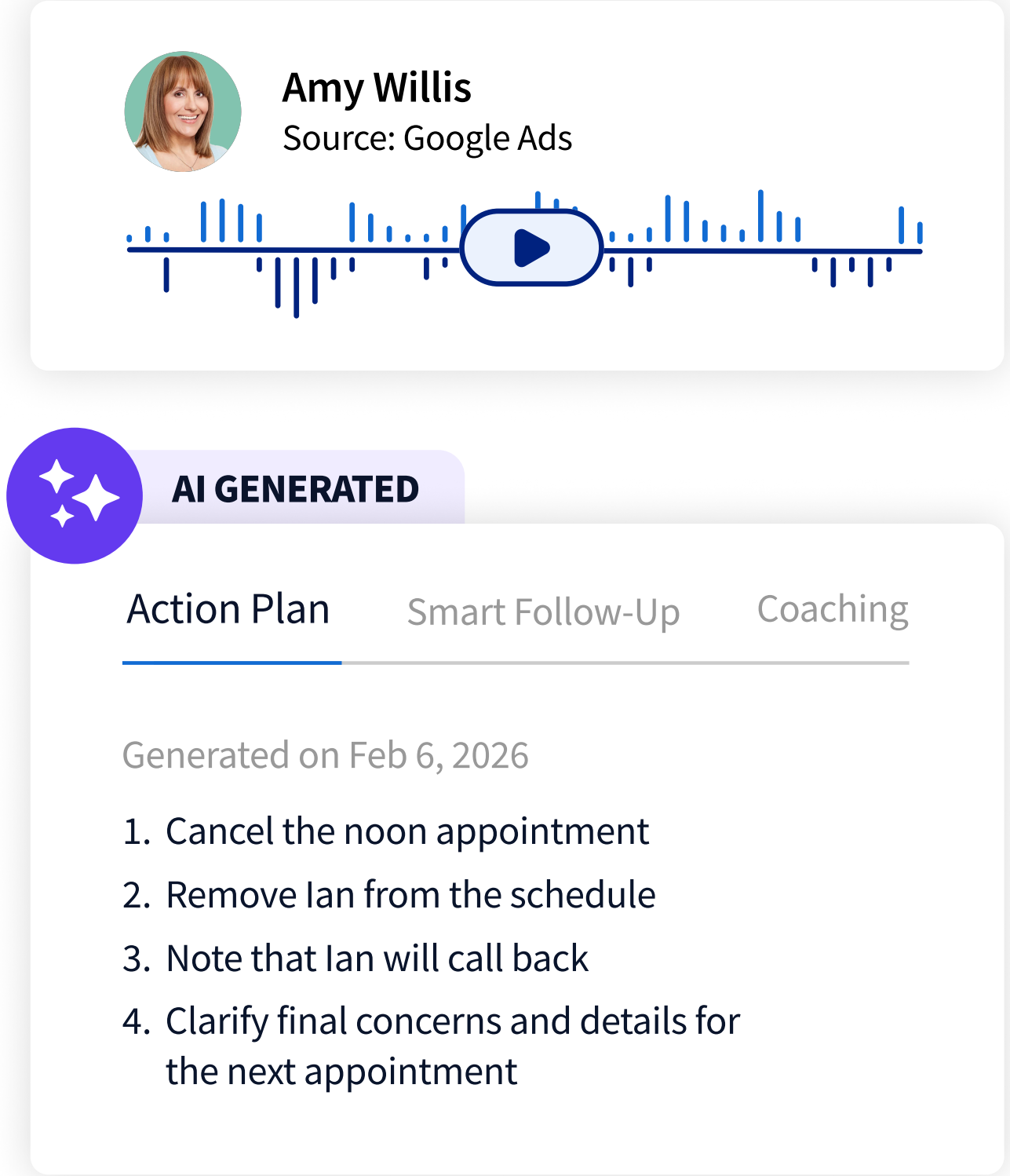
Make AI your always-on assistant across the lead lifecycle

Used well, AI acts as an extra set of hands across the lead lifecycle — helping teams personalize campaigns, qualify leads, follow up faster, and surface insights without added staff or manual effort. In fact, **67% of businesses surveyed are already using AI for personalization**, **59% for lead scoring or qualification**, and **53% for attribution or ROI measurement**. The goal isn't to automate everything, but to apply AI where teams are most stretched, and the impact is greatest.

What to do next:

- ☐ Identify the part of your lead lifecycle where additional support would have the biggest impact.
- ☐ Pilot one AI-powered workflow from this checklist in the next 90 days, such as AI answering missed calls or AI call summaries for coaching.
- ☐ Define one primary success metric tied to that workflow, such as response time, contact rate, conversion rate, or cost per qualified lead.

Tools: Premium Conversation Intelligence™ | Voice Assist



Amy Willis
Source: Google Ads

AI GENERATED
Action Plan | Smart Follow-Up | Coaching

Generated on Feb 6, 2026
1. Cancel the noon appointment
2. Remove Ian from the schedule
3. Note that Ian will call back
4. Clarify final concerns and details for the next appointment

Put AI to work where it matters most

In 2026, AI and growing marketing budgets only pay off when teams fix how they capture, track, and follow up on leads. This checklist shows how to close gaps across the lead lifecycle so AI drives real results.

Start your 14-day free trial

No credit card required.

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[1] CallRail survey of 600 businesses (1–500 employees) across automotive, healthcare, home services, legal, marketing agencies, and real estate, conducted in October 2025.