CallRail

CX Toolkit

Transform your customer experience in 5 steps with CallRail

CX has always been important — but never as important as it is today. Everything your customer sees or interacts with must be appealing, available across channels, and add value to the user journey.

Keep scrolling to read the top five takeaways from our Ultimate CX Toolkit. You'll be theorizing, testing, and improving your customer experience in no time.





*"Global Customer Service Barometer," American Express

with a brand due to a poor experience.*

*"State of Global Customer Service Report," Microsoft

* "State of Global Customer Service Report," Microsoft

they did one year ago.



*"<u>You And Your Business Have 7</u> Seconds To Make a First Impression," **Forbes**

1. Craft an unparalleled first impression

First impressions are formed within seven seconds, and you're not going to get a second chance. Eliminate friction and build confidence from the very first touch. How? Keep scrolling.

Eliminate roadblocks between your customers and their goals

Customer loyalty increases when they can accomplish their objectives quickly and easily — without obstacles and bureaucracy.*

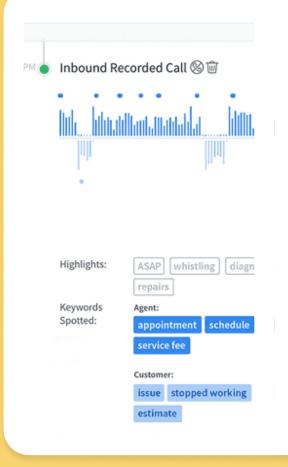
* "<u>Customer Experience in the New Reality,</u>" KMPG





Proactively surface the information your customers are looking for

We live in the age of instant gratification and an overabundance of choice. Your CX needs to be helpful from the very first moment a prospect encounters your brand.





AI-powered <u>Conversation Intelligence</u> analyzes thousands of phone calls, text messages, and web chats to spot Key Terms and reveal trends in the questions your customers are asking.

Harness these insights to proactively answer your prospects' questions and keep them on track to reach their purchasing goal — with you, rather than one of your competitors.

2. Communicate with customers on their own terms

These days, consumers have the power to dictate the way they interact with brands. If you don't provide an experience they want, on the channels they use, they'll simply go elsewhere.

To be a leader, you need to have a seamless presence across communication channels for all your prospects and customers.

¹"State Of the Connected ²"State Of the Connected Customer, 2nd Edition," Salesforce

Customer, 2nd Edition," Salesforce

³"Live Chat Exposes a Fatal <u>Flaw in Your Go-to-Market,"</u> **Hubspot Research**

0%

of customers won't do business with your company if they can't use their preferred channel.¹

78%

of customers prefer different channels at different stages of the buying journey.²

Customers want to engage with your brand via 13 different channels.³



Use a single source of truth for all customer conversations

CallRail's Lead Center platform unites all calls, texts, live chats, and form submissions into one easy-to-use inbox. Your entire team can manage communications in a single system of record, and your customers' conversations across all different channels are reflected in their user profile.

| Will Graham 555-555-7534 | 6:10 pm |
|--|----------|
| Mason Verger 404-913-5167 Talked with Hannibal | 4:31 pm |
| Freddy Lounds 845-555-8303 | 3:13 pm |
| Alana Bloom 555-555-5692 | 11:48 am |
| Jack Crawford 555-343-3455 | 11:28 am |

↑21x

increased likelihood of contacting a lead if you call within 5 minutes rather than 30.*

*"You And Your Business Have 7 Seconds To Make a First Impression," **Forbes**

Create a better first impression

Responding when leads are freshly interested in your product or service leads to higher satisfaction and more sales.

3. Level up your response game

Patience might be a virtue — but in today's fast-moving world, consumers' patience is thin. Responsiveness is a crucial competitive advantage.

Customers won't hang around patiently waiting for a call from your representative. If they don't receive a quick response, they'll go elsewhere.

Win the race against competitors

Prospects frequently buy from the vendor that contacted them first. Don't let an opportunity go to your competitor.

Boost your conversion rates

By responding within five minutes, you'll qualify more leads than businesses that wait longer before reaching out.

May 19, '19 🔵

Sam Wade 🧷 404-555-1234 📿 📞 swade@example.com Atlanta, GA

Form Submission 👘

6 of 6 fields completed

http://google.com/

Marketing agency

6 🕅

+

+

http://boostmarketing.com/contact

http://boostmarketing.com/consultation/

Completed:

Source:

Keywords:

Landing:

Form URL:

Qualified:

Value:

Tags: Notes:



Instantly connect to form leads

CallRail's Form Tracking system connects your agents to inbound leads as soon as they submit an inquiry. With the Lead Center mobile app, agents can respond while out and about, so no prospect goes uncontacted.

4. Understand each customer's unique journey

Customers have different wants and needs at each stage of their buying journey. An effective customer experience requires understanding this evolution and personalizing the ways you engage with prospects at each step.

Total Interactions: 3

Look for systems that provide a holistic view of your customer journey, giving a timeline of website visits, form submissions, calls, texts, chat, and more. This wealth of data makes it easy to connect the dots and give your customers the answers and information they need.

⁴"Live Chat Exposes a Fatal Flaw in Your Go-to-Market," HubSpot Research

⁵"<u>The State of Customer</u> Service Experience," Northridge Group

⁶"<u>State of Global Customer</u> <u>Service Report</u>," Microsoft

10%

higher productivity was reported by employees who have unified CX data.⁴

60%

of callers chose "having to repeat information over and over" as a top customer service complaint.⁵

75%

of customers expect a customer service representative to know their information and product or service history.⁶



Map your customer journey across every contact channel

CallRail's Lead Center platform allows your agents to view a complete, cross-channel timeline that shows every interaction a customer or prospect has had with your business. Dive in to see call transcripts, create or review notes providing more context, and get all the information you need to provide five-star sales or service.

된 Outbound Text

🜿 Inbound call

- 🔁 Inbound Text
- 🔇 Missed call
- Abandoned call
- 🔁 Inbound Text
- 된 Outbound Text

90% of consumers say customer service is important when

choosing a brand.*

*"<u>You And Your Business Have 7</u> Seconds To Make a First Impression," Forbes

Listen or chime into live calls

Don't let an

5. Ensure quality in every call

It's crucial to get customer service right, but even the most cheery and receptive agents can stumble without the right training or support.

Analyzing your agents' recent conversations can not only expose gaps in your training programs, but also illuminate which questions and objections lead to lost opportunities.

Review past call recordings

Tap your greatest

Analyze historical trends

Rapidly surface key

opportunity wither on the vine. If your agent is struggling, jump in to provide answers or gentle coaching.

source of customer feedback – your call recordings. Learn what makes a conversation great (or not).

phrases or trends in customer sentiment using a conversation intelligence tool.

| Cutbound rec | orded call |
|------------------|------------------------|
| Date: | Apr 24 1:13pm |
| Tracking number: | Keyword Pool main site |
| Duration: | 365 |
| | |
| Agent: | Joe MacMillan |
| | |



Embrace next-generation communications software

Leverage team management tools and call recordings in Lead Center and Conversation Intelligence to discover insights, save time, and improve the quality of your customer conversations.

Future-proof your CX today

If you fall behind, you might never catch up. Prioritizing CX is the best way for businesses to fend off the competition, attract and retain customers, and protect their futures.

Fortunately, putting your CX first isn't as hard as you might think. With the right tools in place, you can:



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