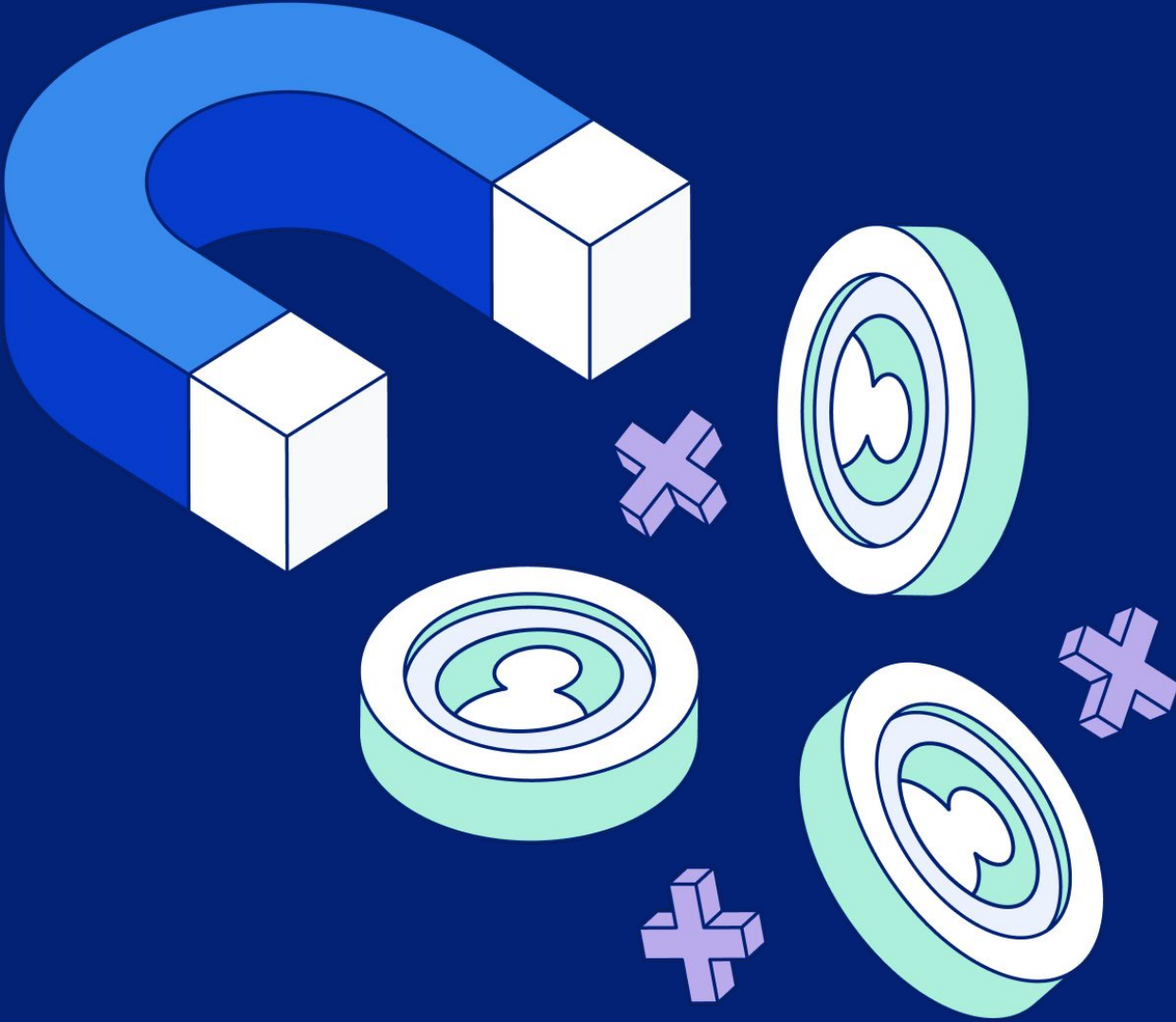
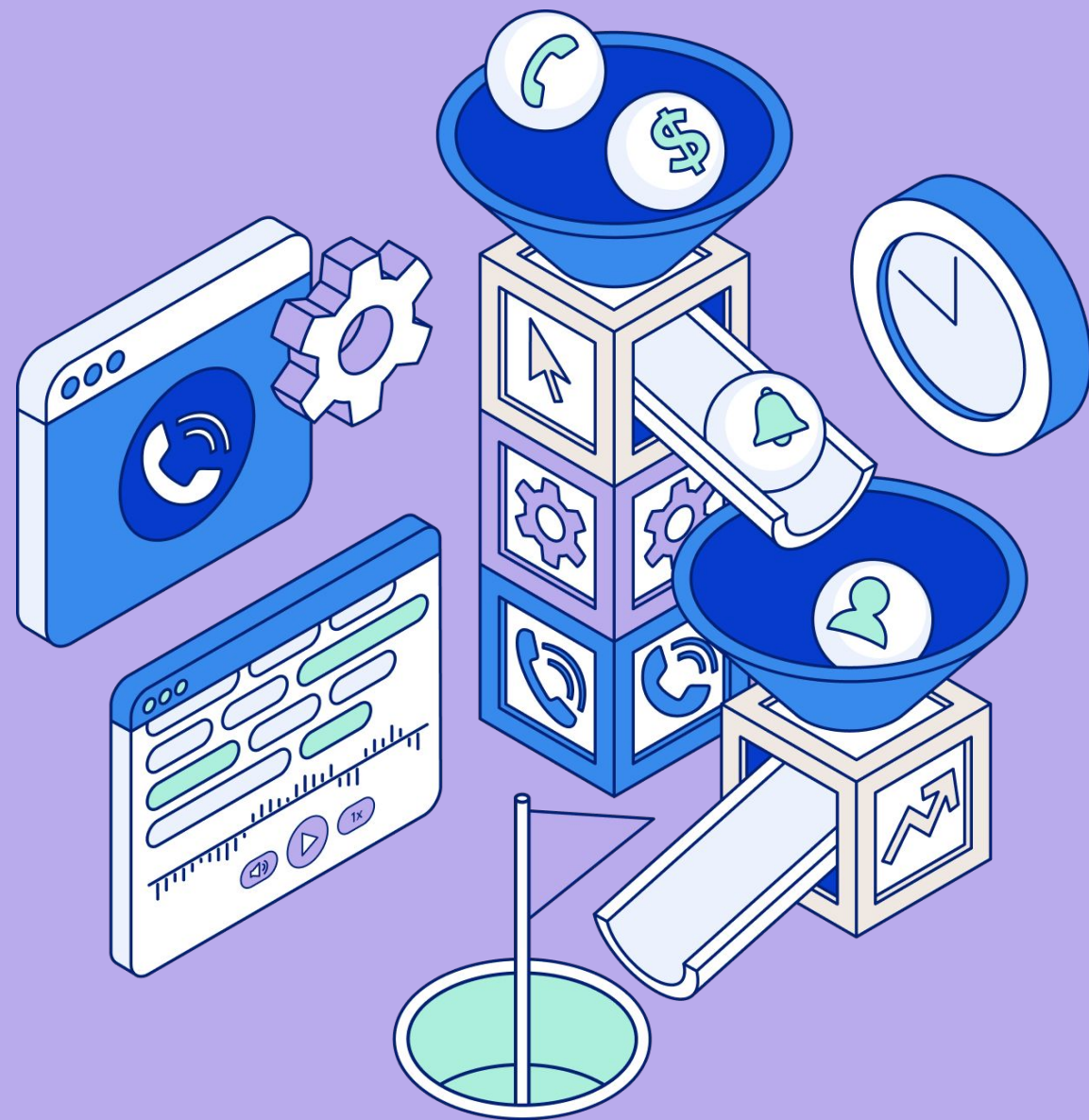


CallRail

Ebook

The Agency Marketer's Guide to Client Retention





Overview

In today's competitive agency landscape, it's more difficult than ever to stand out from the crowd and retain clients. As AdWeek reports, it's not uncommon for small-to-medium-sized firms to see upwards of 40 percent client turnover year over year.

Too much client churn can be a deathblow to your agency, since it costs up to 4 times as much to earn a new client as to retain an existing one. And as AdWeek's report explains, a consistently high rate of churn indicates that your agency is failing to establish long-term relationships with your customers. This can seriously stunt your agency's growth, since recurring client revenue is so fundamental.

At the same time, we've seen a recent explosion in the availability of automated and AI-based tools that provide significant time savings for marketers and help them fulfill client needs that were too difficult or laborious to do before.

Throughout this ebook, we'll highlight how agencies can automate or expand their capabilities to delight and retain their clients for years to come.

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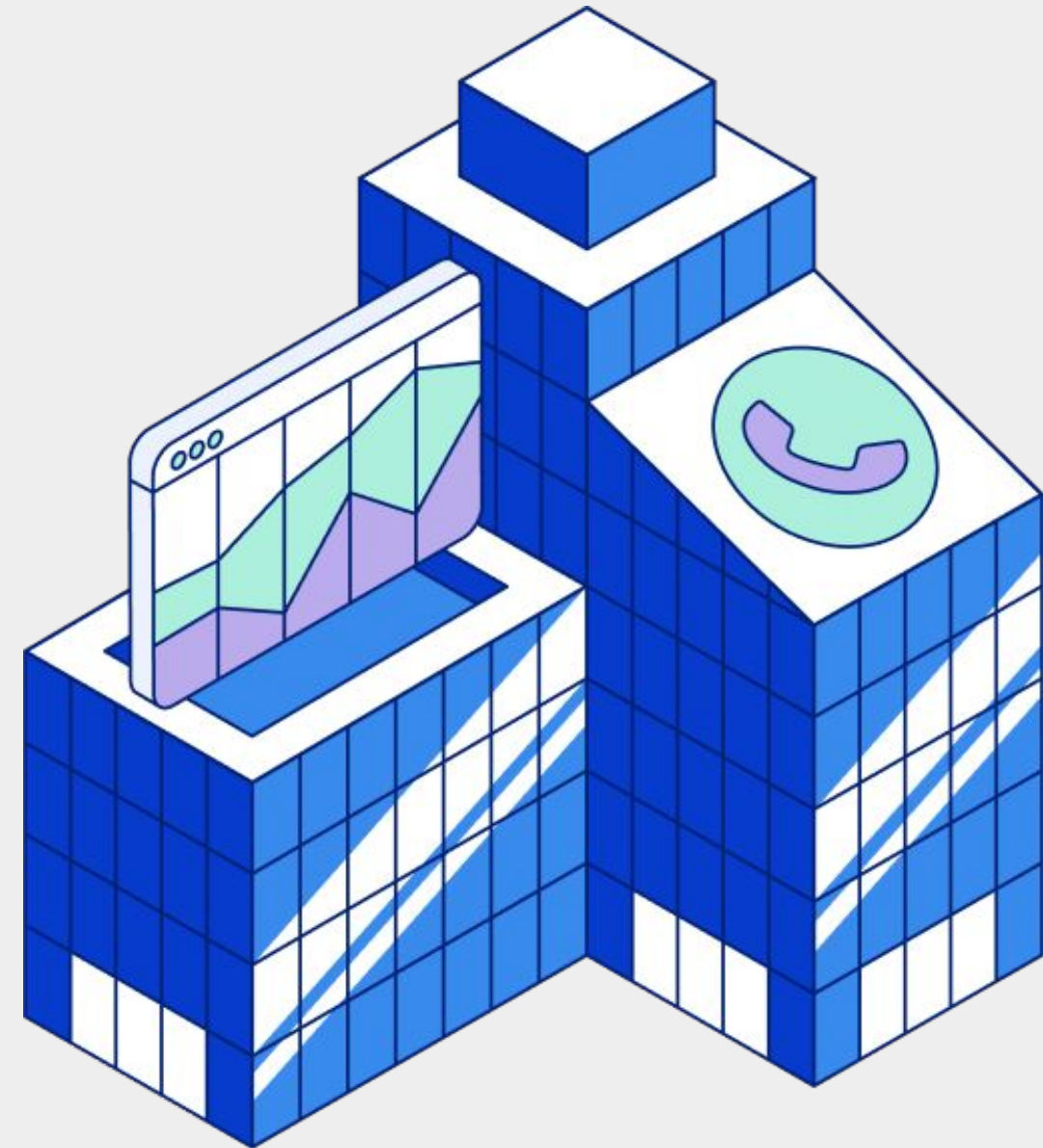
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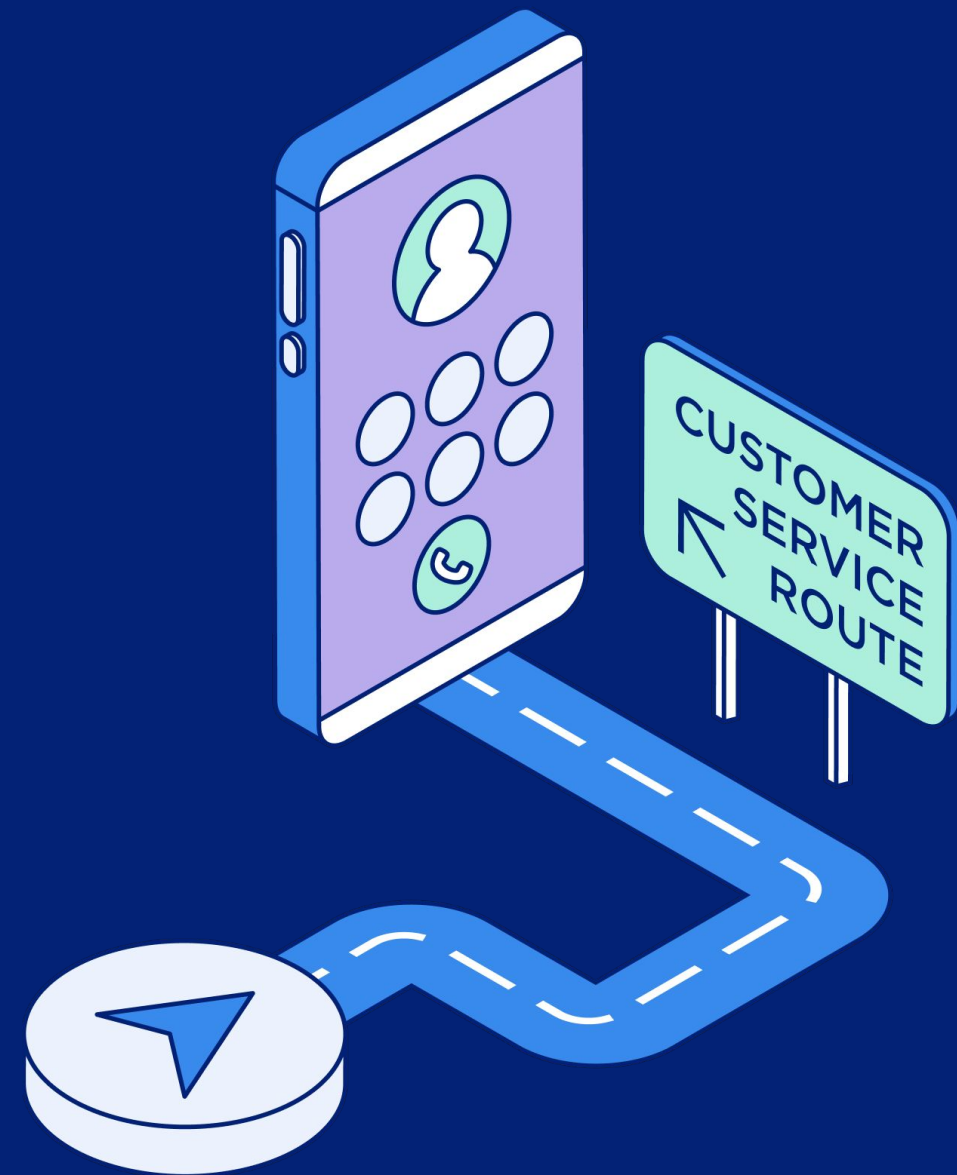
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Chapter 1

Why Clients Break Up With Their Agencies

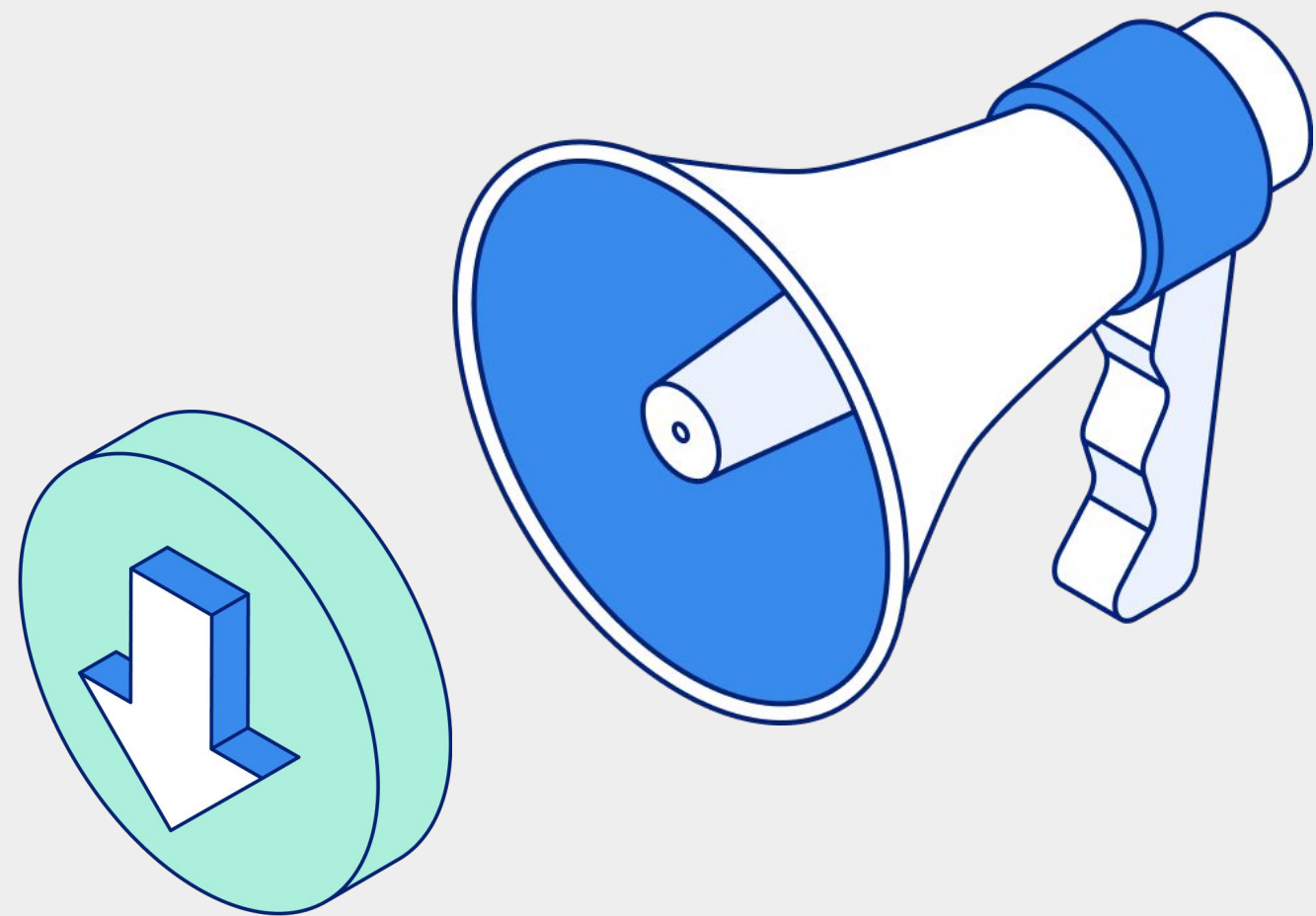
The agency-client partnership is like any relationship. In the beginning, your agency is in the courtship phase with a potential client. You want to show why you're the best and convince them you're the agency they need, ensuring long-term client retention. Some potential clients are already taken, others just aren't interested, and some decide your agency is exactly what they want. Score.



So, you won the client you've been wooing for weeks (or months). Now, the real fun begins. There's a ton of new ideas you and the client have, and everyone is excited about what's to come. However, in the midst of the work, frustrations begin to peak. The client isn't responding to your outreach like they used to, or feels you aren't really listening to them.

What initially began as an enthusiastic partnership is now flooded with professional petty bickering that seems to always begin with, "Per my last email..." You're trying your best to get the job done, but things just aren't working out. Why?

As agencies work to enhance their focus on client retention strategies, taking the time to reflect on why clients churn is necessary.





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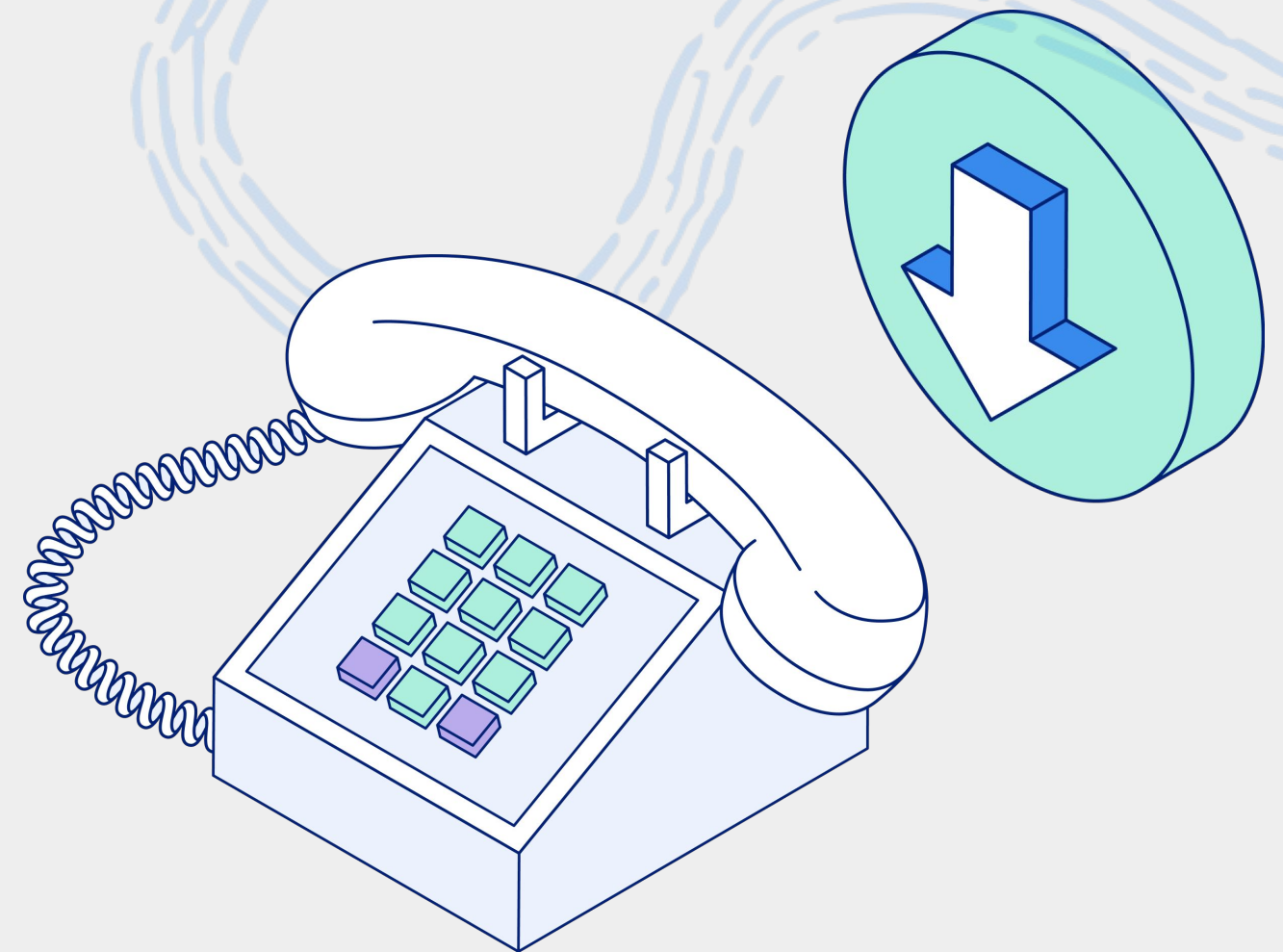
“For us, [call tracking] was a critical part of our mission, because we want to be able to accurately track all sources of contact for our clients. And we found that for most of our clients, they were tracking form fills and web sessions and everything else, but not calls.”

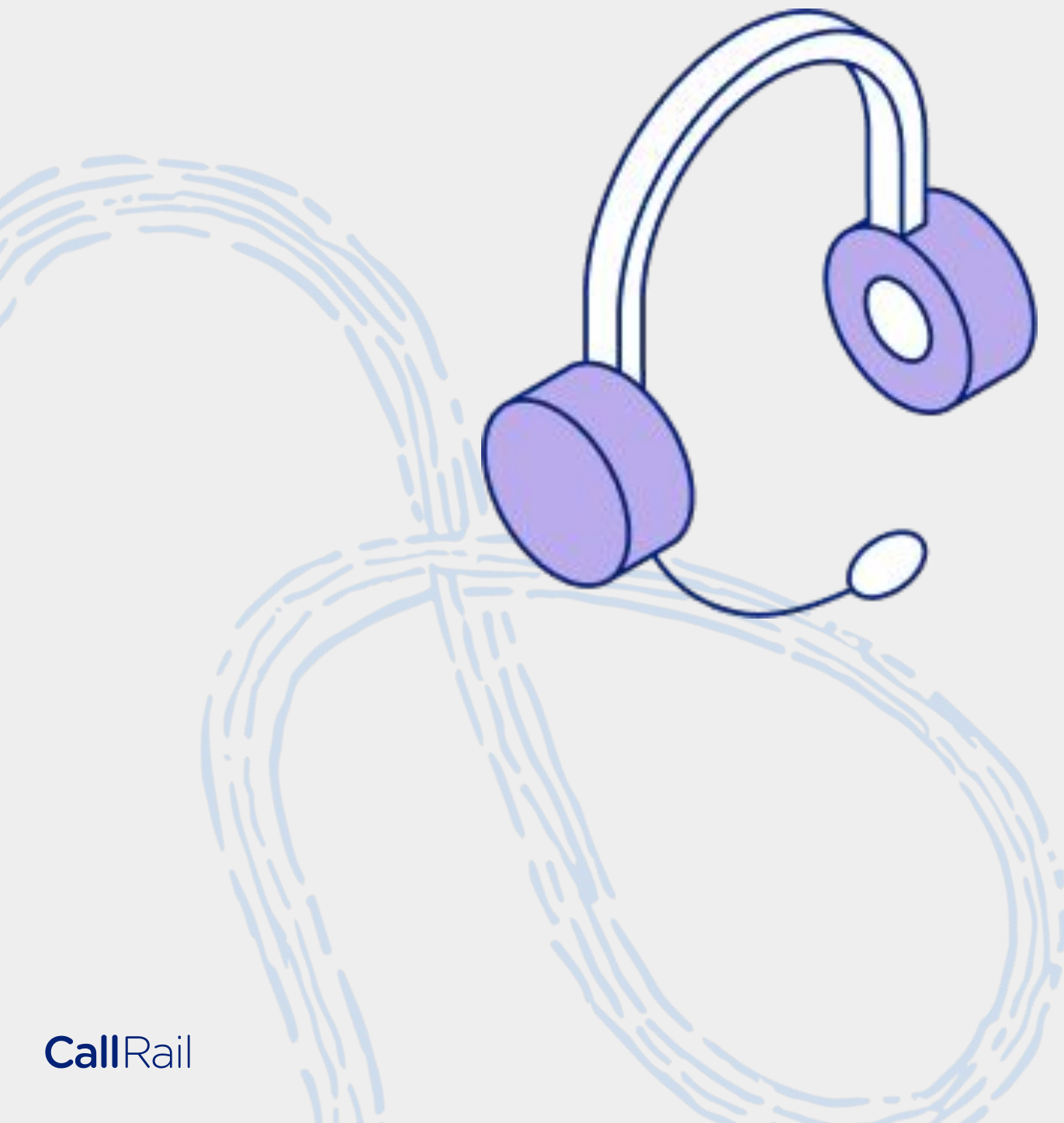
- **Joe Khoei**
Founder and CEO of SalesX

Poor Communication

Clear and concise agency-client communication—at all times—is a must. If you're noticing poor communication, this may be an indicator of underlying issues.

Maybe there's a misunderstanding between you and your client about the direction of a current campaign. Perhaps the client wants to understand more about your agency's processes and how results are achieved. Or, you aren't getting the feedback you need from your client to progress. Regardless of the specifics, miscommunication could send your client running to a competitor.





Like any relationship, combatting communication problems starts at the beginning:

- Set realistic expectations for you and the client.
- Create a detailed plan that proves you understand your client's pain points.
- Incorporate tangible action items and goals that will be accomplished throughout various stages of your plan. (Asana is a great tool to help with this.)
- Address the best way for you and your client to present questions, concerns, and constructive criticism.
- Actively communicate with your client on a regular basis as you carry out the plan and get those results.

In every relationship, no matter what problems you're facing, at some point you have to talk about it. It won't always be easy, but it could help ensure long-term client retention.



You're Broke

Alright, maybe you're not totally broke. But money is extremely tight and your client is starting to realize it. This is a huge red flag for a client—if they feel like your agency is struggling financially, it's only a matter of time before they start talking with an agency they feel is more financially secure.

Money problems can result in a serious lack of focus by your team, because it's almost impossible to do your best work if you're worried about keeping a business afloat. Struggling to manage basic tasks because you're stretched too thin financially is not a situation you want to be in.

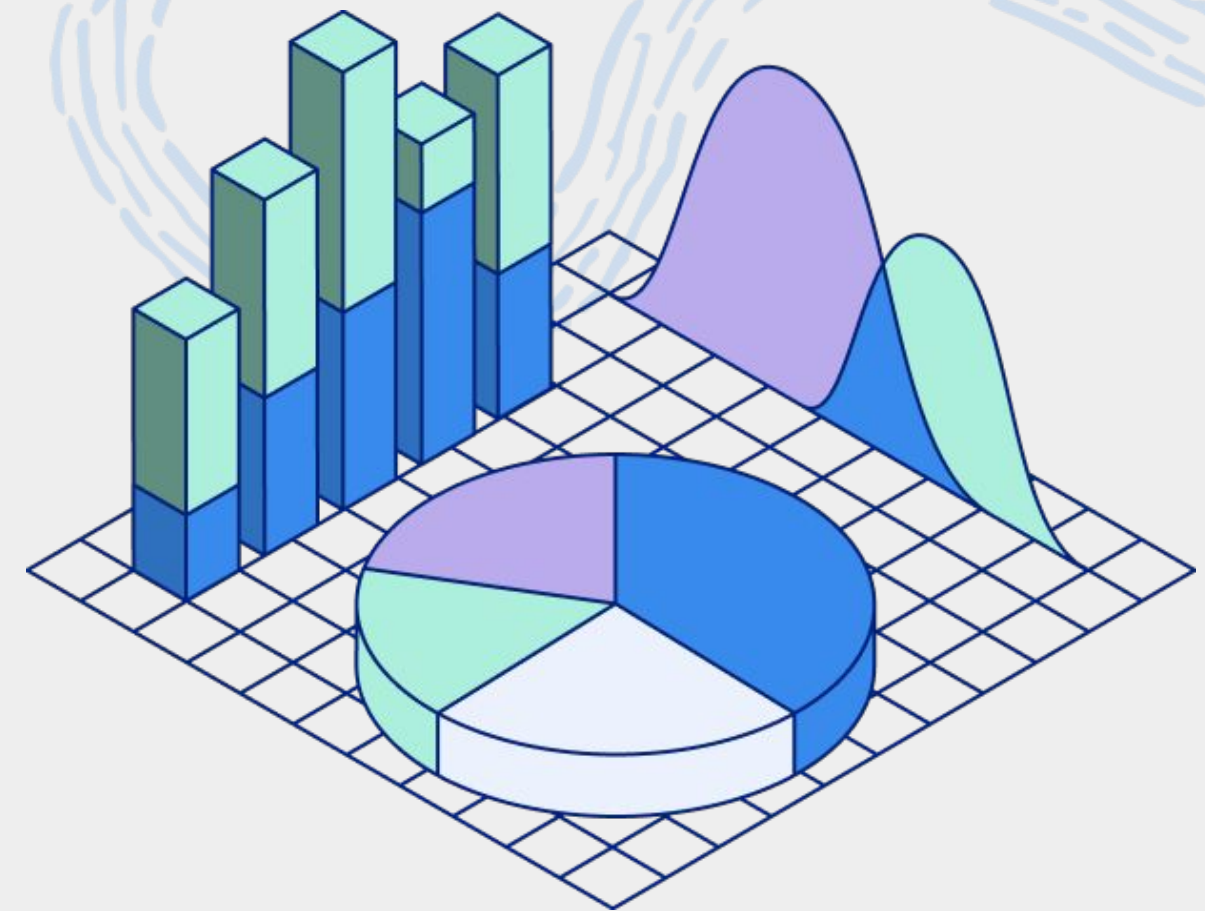
If things get too dire, you could end up desperate and trying to penny-pinch for every little service. Or worse, having to let go of employees who helped establish and grow relationships with your clients—either of these problems could be a breaking point when it comes to client retention.

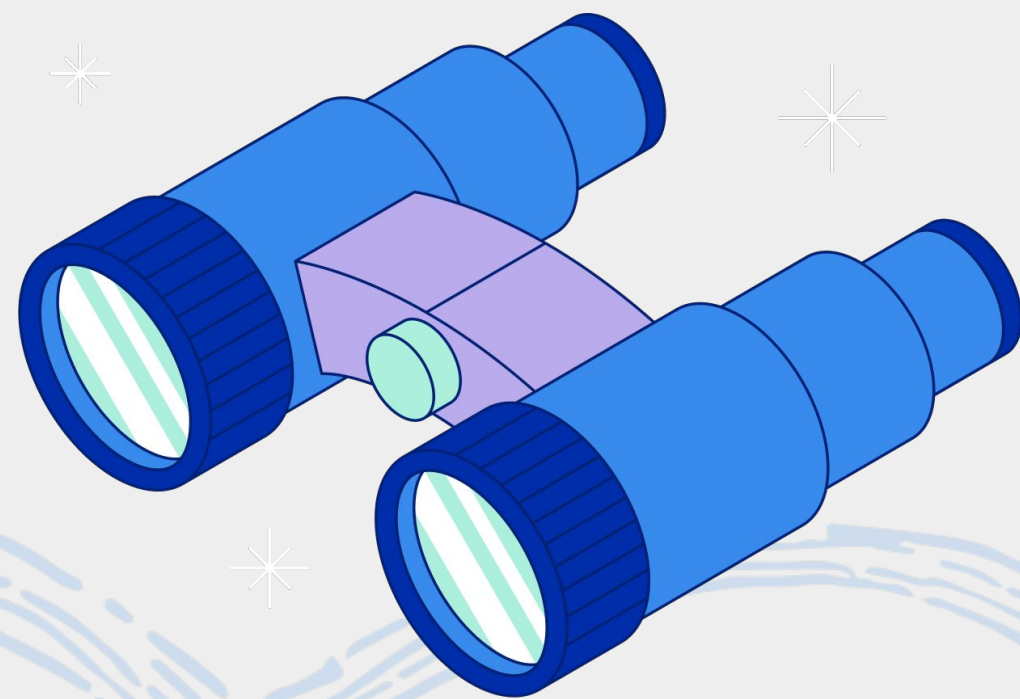
Healthy finances are a hard, non-negotiable item. Establish a strong financial foundation and make informed financial decisions for you and your client's future.

Lack of Results

One of the best ways to defeat churn rate and improve client retention is showing your client real results. Your overall goal shouldn't be to promote brand awareness, increase web traffic, or even boost customer conversions—it should be to prove your worth to clients.

Agencies are constantly struggling to find the best way to show how their work has a positive impact on a client's business. If your client can't concretely see that you're contributing effective results, why should they stay? They'll realize there's no value in the relationship.





It's Not You, It's Them

Every agency has at least one former client they don't miss. (They're the professional equivalent of your crazy ex.) This client made everything about working together beyond difficult. From the beginning you may have felt the client could be problematic, but you dismissed it because you felt that it was worth the challenge. You were wrong.

Clients that create unnecessary problems for you and your team are an epic fail. If it takes longer to accomplish tasks because of their difficult demeanor, this is ultimately a loss for your agency. And allocating too much time and too many resources toward the wrong client can mean you're depriving another client of the care and attention they need.

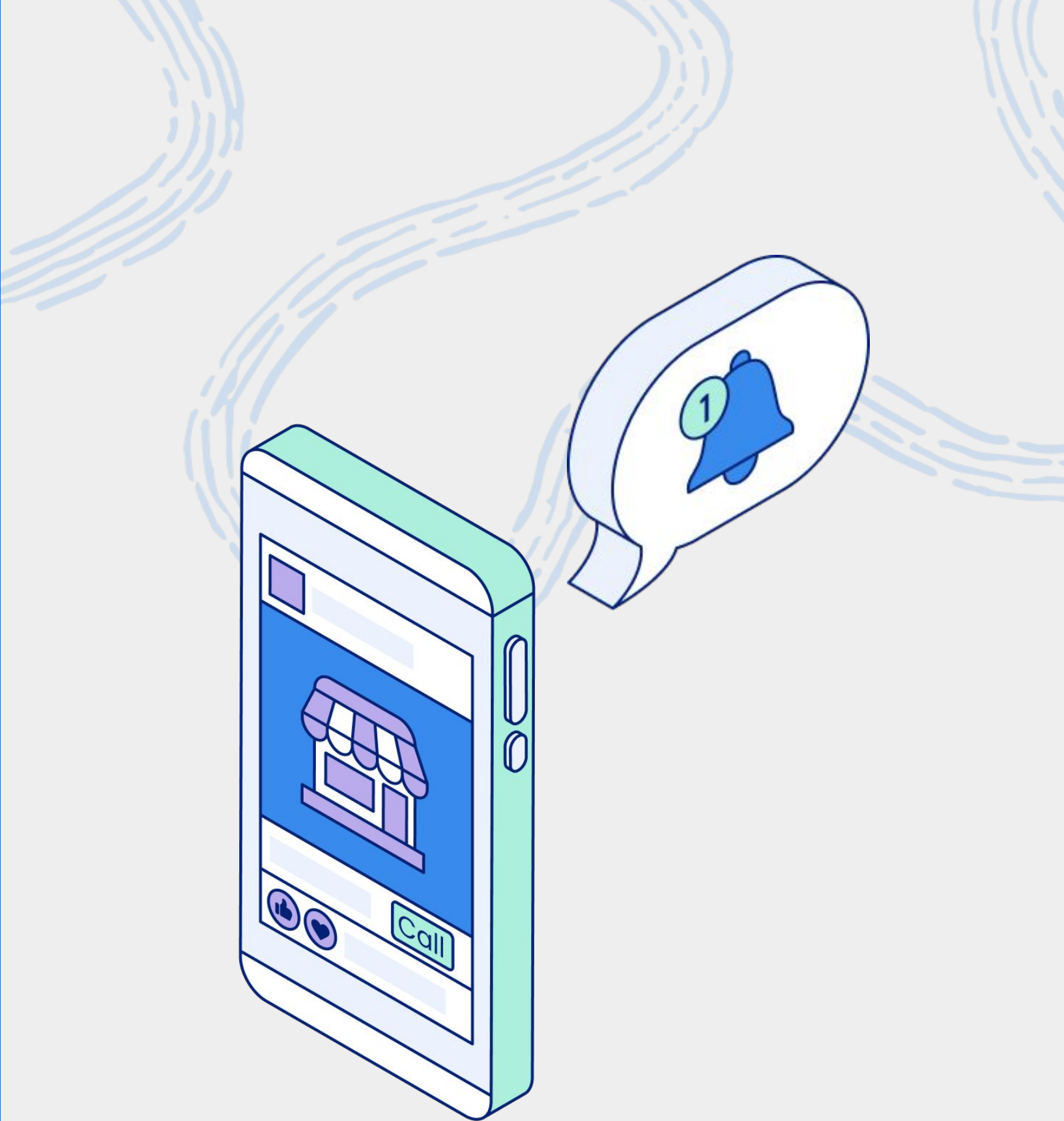
Don't overexert yourself for clients like this. Agencies will try to make it work with toxic clients for tons of reasons, but if you end up bleeding time and resources, you'll eventually realize they're not worth it. And no matter how hard you work to please an unsatisfiable client, they're most likely going to end up churning anyway. Take initiative and recognize when a client simply isn't a good fit—you deserve better anyway.

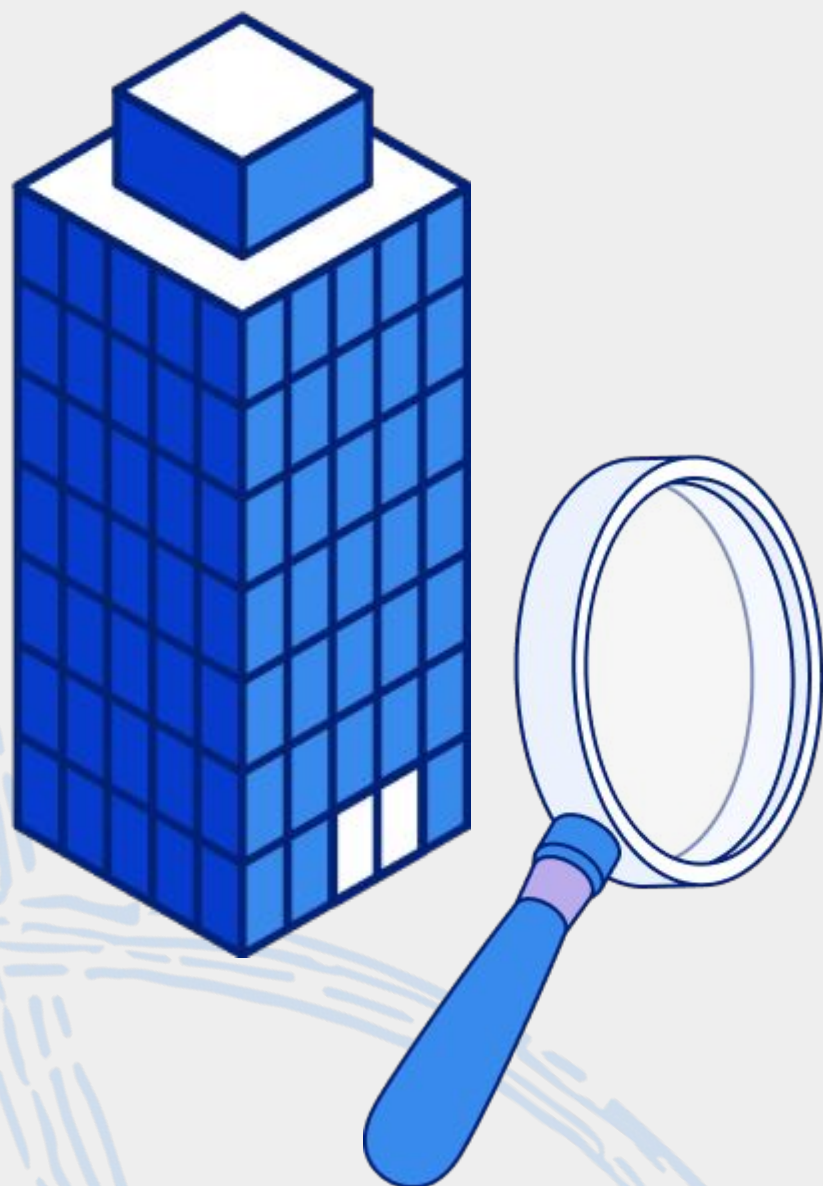
They've Outgrown You

This is a difficult realization to confront, but it happens: Your client has reached the point where they're independently able to fulfill their own marketing needs. It's unfortunate for you, but this doesn't have to be a complete loss.

If your client is cutting ties because they've outgrown your agency, use this opportunity to establish a referral partnership. They might not need you anymore, but there's plenty of other prospects that will.

Ask them if you can use their growth as an example to create a compelling customer testimonial.

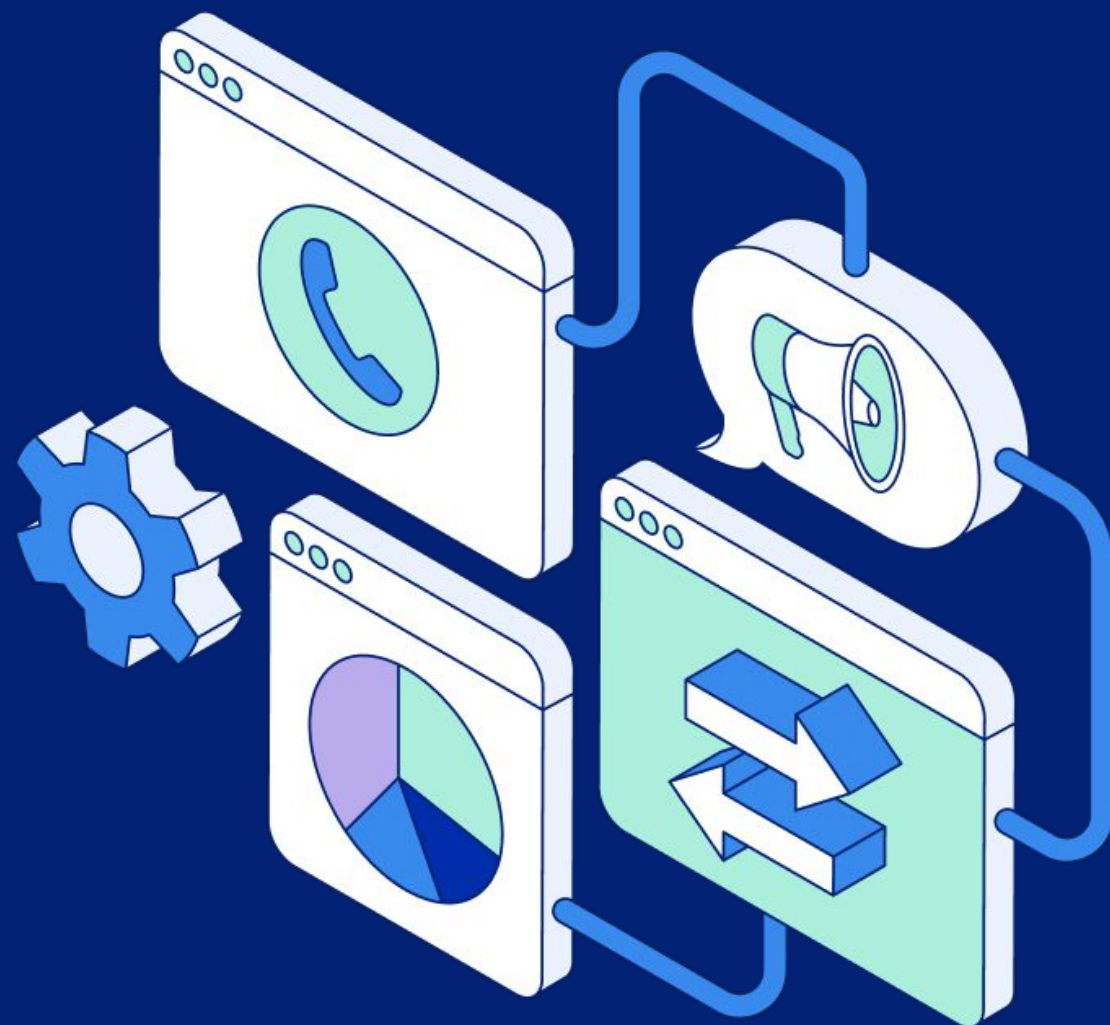




This is fundamentally different from the other types of agency breakups we've mentioned, so it doesn't have to end negatively. It's all about perspective—you can view it as losing a client, or as gaining an ally that can help bring in new clients. There's nothing wrong with being friends after the breakup.

Pinpointing why a client left can help your agency develop client retention ideas. But first, you have to take the time to thoroughly assess your client breakups. Reducing churn requires analyzing what you've done in the past to enhance what you'll do in the future. And like any breakup, closure is best achieved through reflection.

But what's an agency to do once they figure out why their clients churn? Most of the time, the answer lies with data-driven marketing.



Chapter 2

The Solution to client churn

You can combat client churn from two angles.

On the one hand, you need to make sure your agency has its account management processes refined to a T, so communications flow smoothly, expectations are properly set, and your clients feel heard and respected.

On the other, you must strategically employ data-driven marketing to not only generate ROI for your clients, but also definitively prove that value came from your agency's marketing efforts—giving them all the reasons they need to keep you around for the long haul.

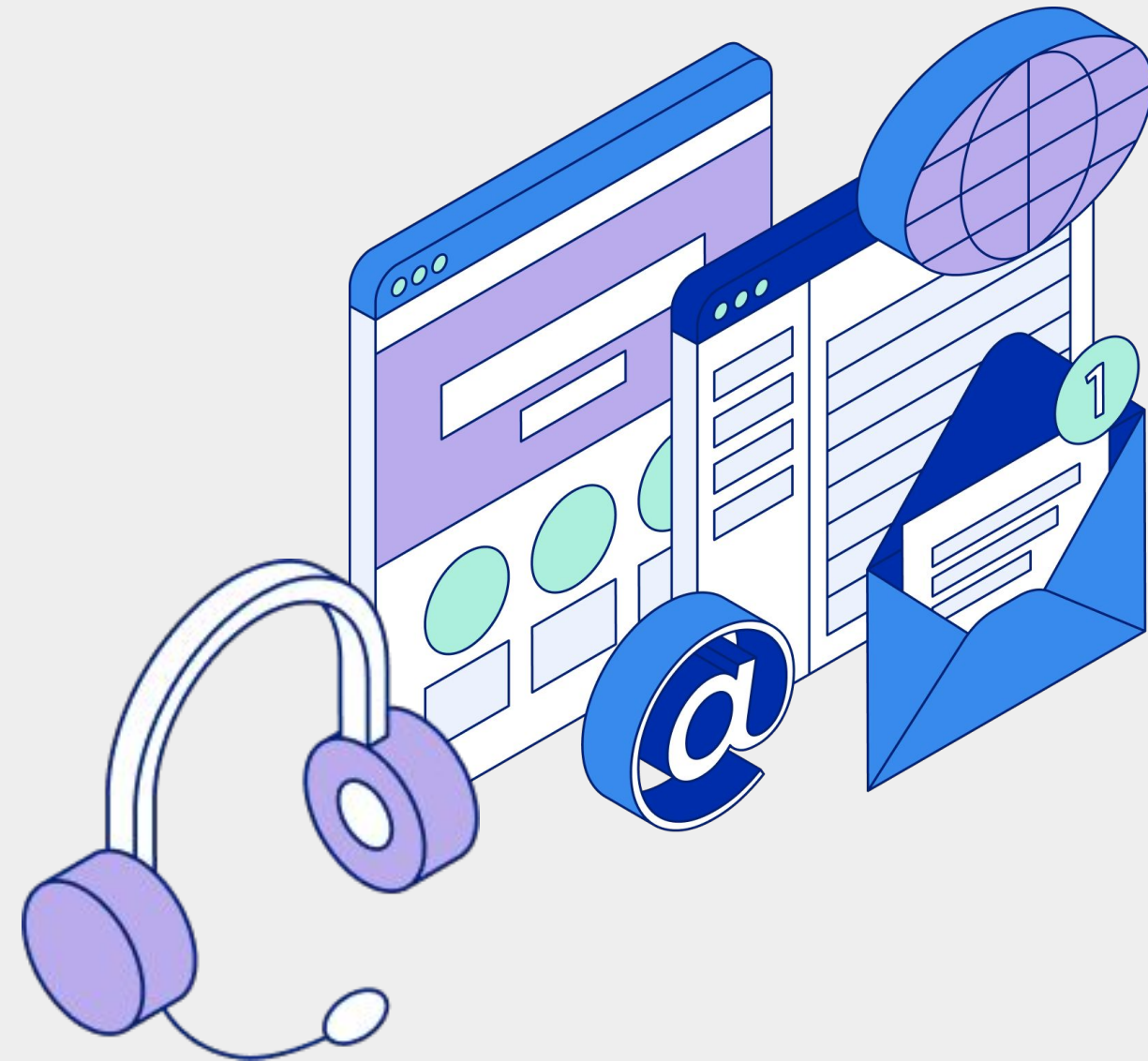
Handily, systems exist to make much of this work easier and less manual for your agency. Tools such as call tracking can provide marketing source attribution for virtually any form of lead engagement. And everything from sending weekly reports to scoring and filtering leads can become less time-consuming with the help of automation and AI.

Part 1: Get Your Client Relationships On Point

Even in the best of times, agency marketing can be like performing a delicate dance. You have to divide your time between doing *the work*—that is, making creative and effective marketing campaigns that drive the ROI your clients seek—and managing your client relationships by communicating early, often, and thoroughly.

Maintaining relationships and keeping the communication channels wide open with your clients is key to your agency's success. Most importantly, it builds trust. When clients know you're on the ball, keeping them in the loop and understanding their needs, they'll trust you to handle that key part of their growth strategy.

Plus, it helps everyone get on the same page. When you're talking regularly and clearly, it means both sides know exactly what's going on. This means fewer mix-ups, easier pivots (if necessary), and more successful teamwork.

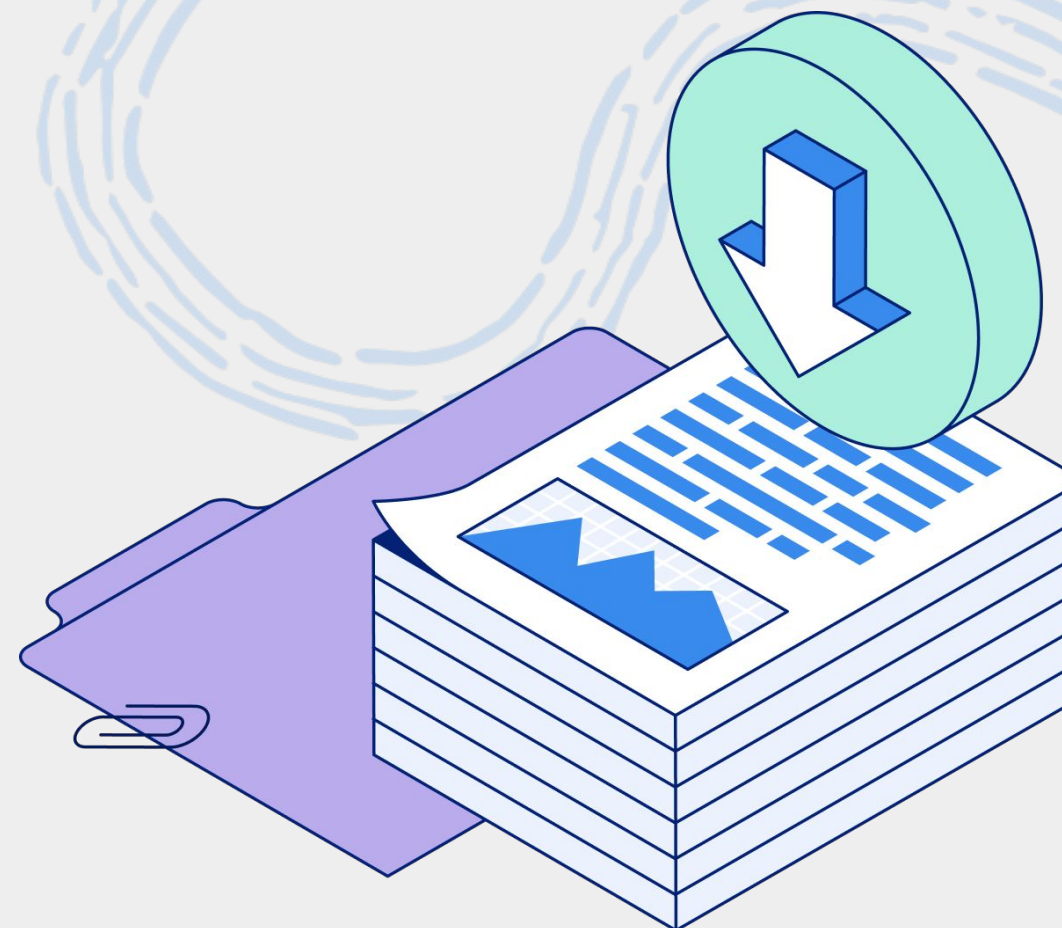


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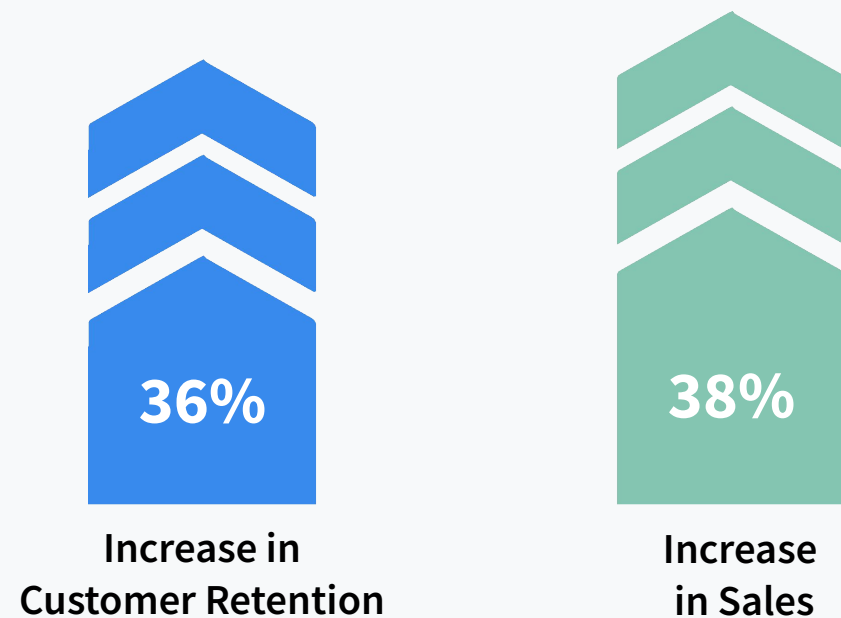
Set the right expectations with a marketing SLA

One of the most critical tasks in any agency-client relationship is setting the proper expectations for the kinds of services your firm will provide. Misaligned expectations can have serious repercussions for your business—the client’s hurt feelings might lead to them taking their business elsewhere, and the resulting negative word-of-mouth can impact your standing with current and prospective clients alike.

The best way to head off these problems before they begin is with the proactive implementation of a Service Level Agreement (SLA), a contract between firm and client that specifies in clear detail the services you will provide. Though these types of contracts were previously associated with service providers—like IT companies, insurance agencies, and telecoms—they have become increasingly common among agencies and marketers for the peace of mind they bring clients.

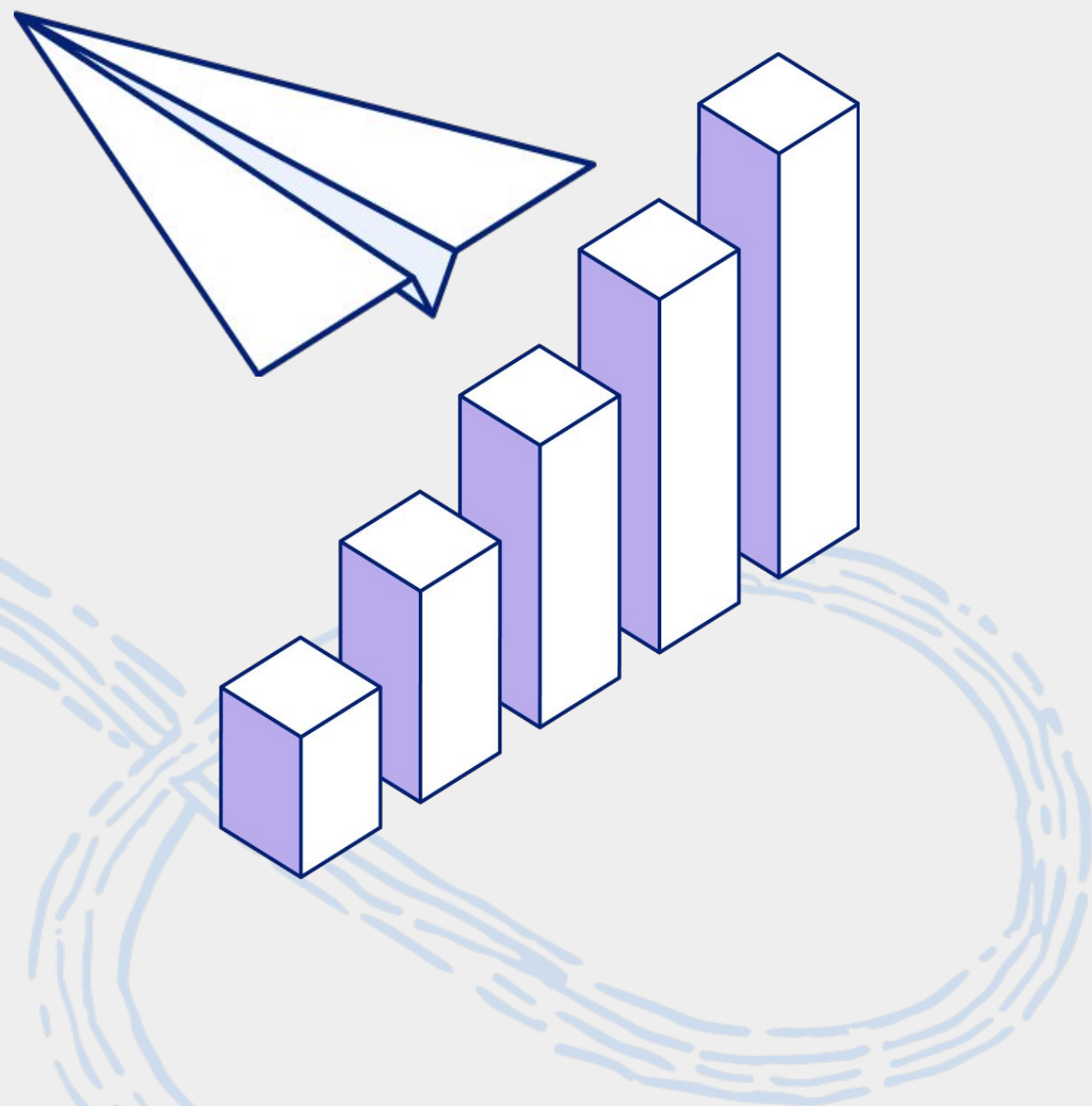


After SLA implementation with clients



At a minimum, a good SLA will contain an itemized list of the services your firm will provide the client, well-defined performance targets for your agency to meet, backup strategies or penalties if those targets are not met, clear deadlines for time-sensitive projects or campaigns, and dedicated hours during which your clients can contact you.

And there's a very good reason why your business should make this extra effort: HubSpot reported in 2017 how companies that implement SLAs with their clients see a **36 percent increase in customer retention and 38 percent more sales**, compared to firms that do not. So if you haven't implemented SLAs yet—especially for your bigger clients—there's no time like the present to get started.



”

“The key is to set realistic customer expectations, and then not to just meet them, but to exceed them —preferably in unexpected and helpful ways.”

- *Richard Branson*

2

Implement a comprehensive lead-scoring system with AI

Experienced agencies know that good marketing isn't just about bringing in a high volume of new leads and prospects. Equally important is making sure that *quality* leads—those most likely to convert—are coming in and then promptly being passed along to your sales team.

That's why it's mission-critical for your agency to implement a lead scoring system for your clients. Lead scoring will look different depending on your field or industry, but there are still some universal ground rules:

- Define the behavioral and demographic attributes of an ideal lead (their income, how old they are, where they live, etc.)
- Build a scoring framework and create a formula that numerically quantifies a lead's rating, based on your marketing attribution data
- Document your lead-scoring system and ensure it's fully integrated within your SLA

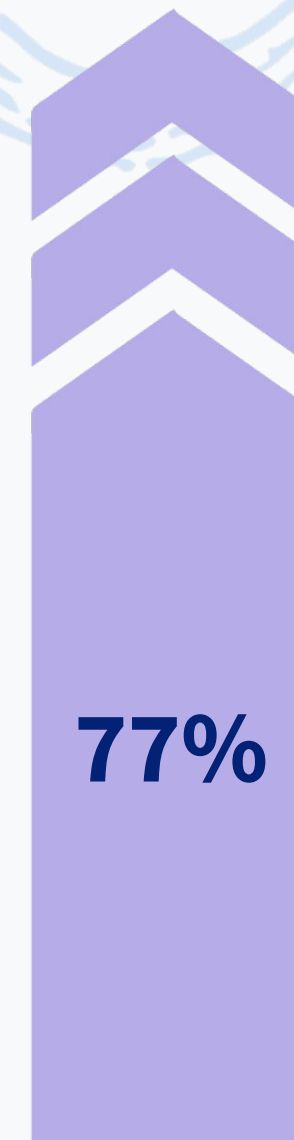


By filtering out bad or unresponsive leads, a scoring system can yield immediate and quantifiable results for your agency, allowing your sales reps to focus their time and energy on the prospects that are most likely to convert or become repeat customers. Agencies that use a lead scoring system see a **77 percent increase in ROI** over firms that do not, as MarketingSherpa reported.

There are even solutions that can automatically analyze, score, and sort inbound leads. Recent advancements in AI and machine learning (like CallRail's own [Conversation Intelligence](#)®) can enable agencies and firms to score leads with minimal human input, allowing teams to focus on boosting conversions and ROI.

More leads and conversions mean more happy clients, which means more repeat business and better word-of-mouth for your marketing agency.

Agencies that use a lead scoring system



77%

Increase in ROI

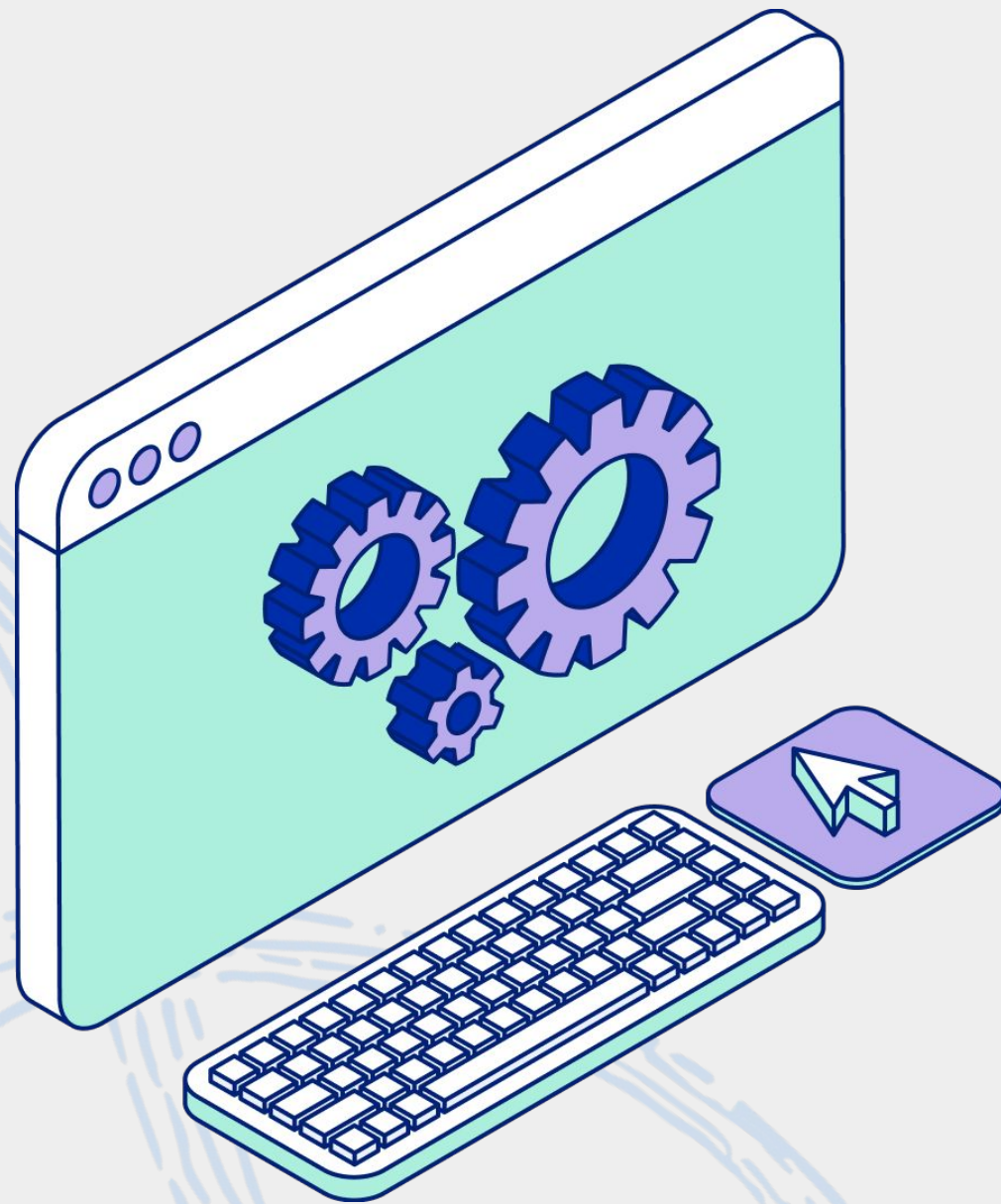


3

Help your clients choose the right CRM

Once your agency starts taking on larger clients, they may need you to recommend and help implement Customer Relationship Management (CRM) software. CRMs like Salesforce and HubSpot are centralized databases used by businesses to store contact information, account data, leads, and other sales opportunities. Proper implementation of a CRM across sales, marketing, and customer service teams will help your clients make the most of those precious leads your agency generates.

For mid-sized businesses, a CRM helps centralize customer data for easy access across multiple teams and devices, which is an invaluable competitive advantage as their business scales and grows. And for larger enterprise businesses, the sophistication of modern CRMs can perform advanced tasks like sending personalized emails, gathering data and insights from social channels, and providing a top-level view of how your marketing is performing.



One of the biggest advantages to your agency, when your clients are using CRMs, is the wealth of integrations available. The major CRMs, including those mentioned above, all integrate with dozens to hundreds of top marketing tools (including CallRail), letting you update lead records and consolidate info from virtually any marketing data source.

All that said, there's usually a somewhat steep up-front cost to using a CRM, which might scare your smaller clients away from using them. Fortunately, most of the major CRMs offer some kind of no-obligation trial, letting your agency set up a proof of concept and demonstrate their value over a few weeks to a month.

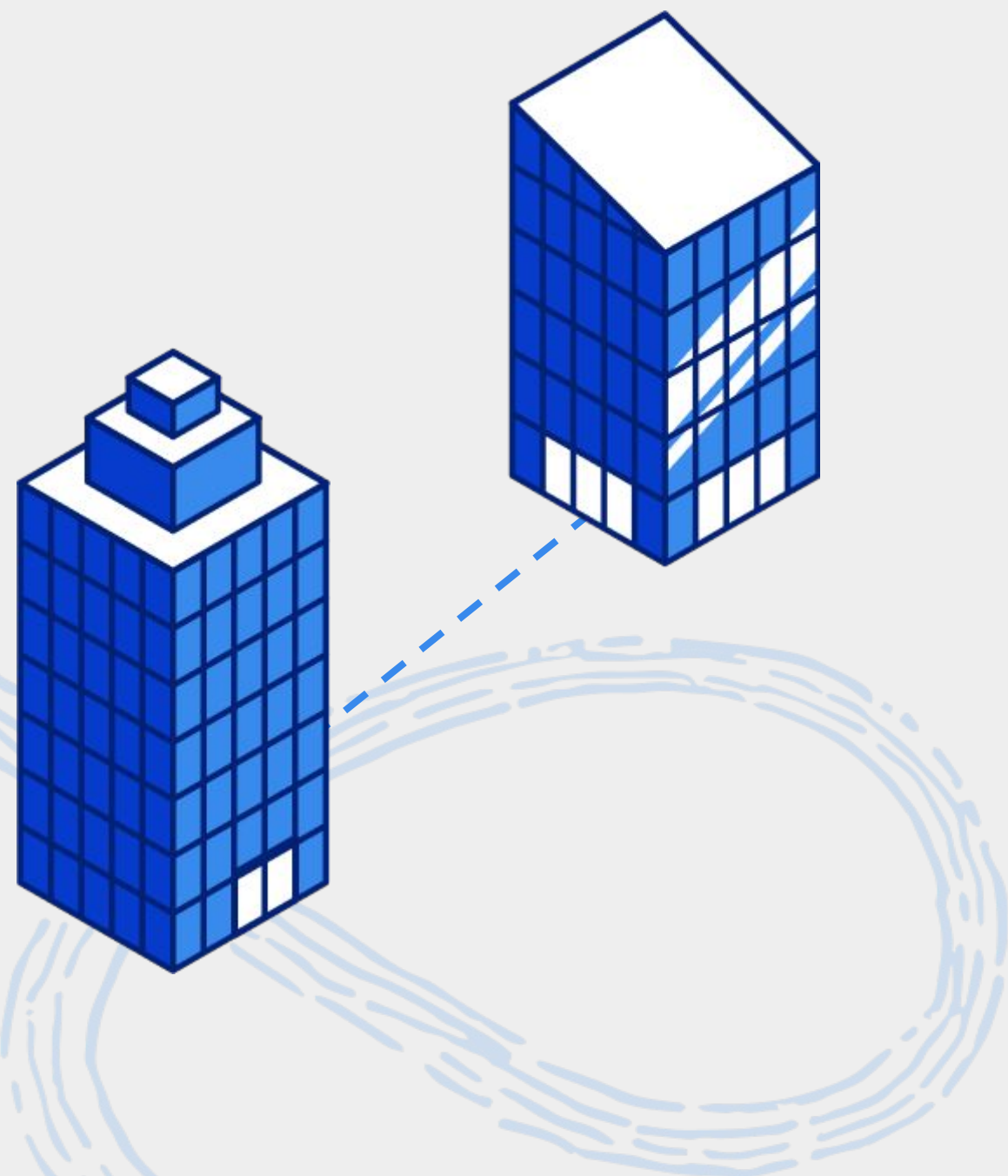
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Develop an agency referral program or partnership system

At its core, agency marketing is a relationship business—your firm is only as strong or lucrative as the bonds you’ve cultivated with your clients. Word-of-mouth can make or break your business, and forging meaningful relationships with new clients is every bit as important as strengthening ties with existing customers.

One of the best ways to both bring in new business and deepen your existing relationships is through a referral program, where current partners receive a one-off lump sum (or smaller ongoing commission) for directing new clients to your agency. Not only will this bring new business your way, you’ll also incentivize the clients making the referrals to stick around as long as possible and reap the full benefits of the partnership.





5

Link up with complementary businesses to expand your capabilities

What do you do when a client comes to your agency with a request you're not equipped to fulfill? Simply responding, "Sorry, we can't help you with that," sours the relationship and forces your client to look elsewhere—and potentially discover a new marketing agency.

The key here is to identify the services your clients want but which you don't offer (and have no plans of offering) and create a partnership with an agency that has a gap *you* can fill. For example, if you run a small agency strictly focused on web development, but you have clients asking for SEO services, you could find an SEO agency partner who doesn't offer web development.

In doing so, you not only keep your hard-earned customers from churning, you also open up your pool of potential clients to those being referred from your partner agency.

6

Shine a spotlight on your clients with case studies

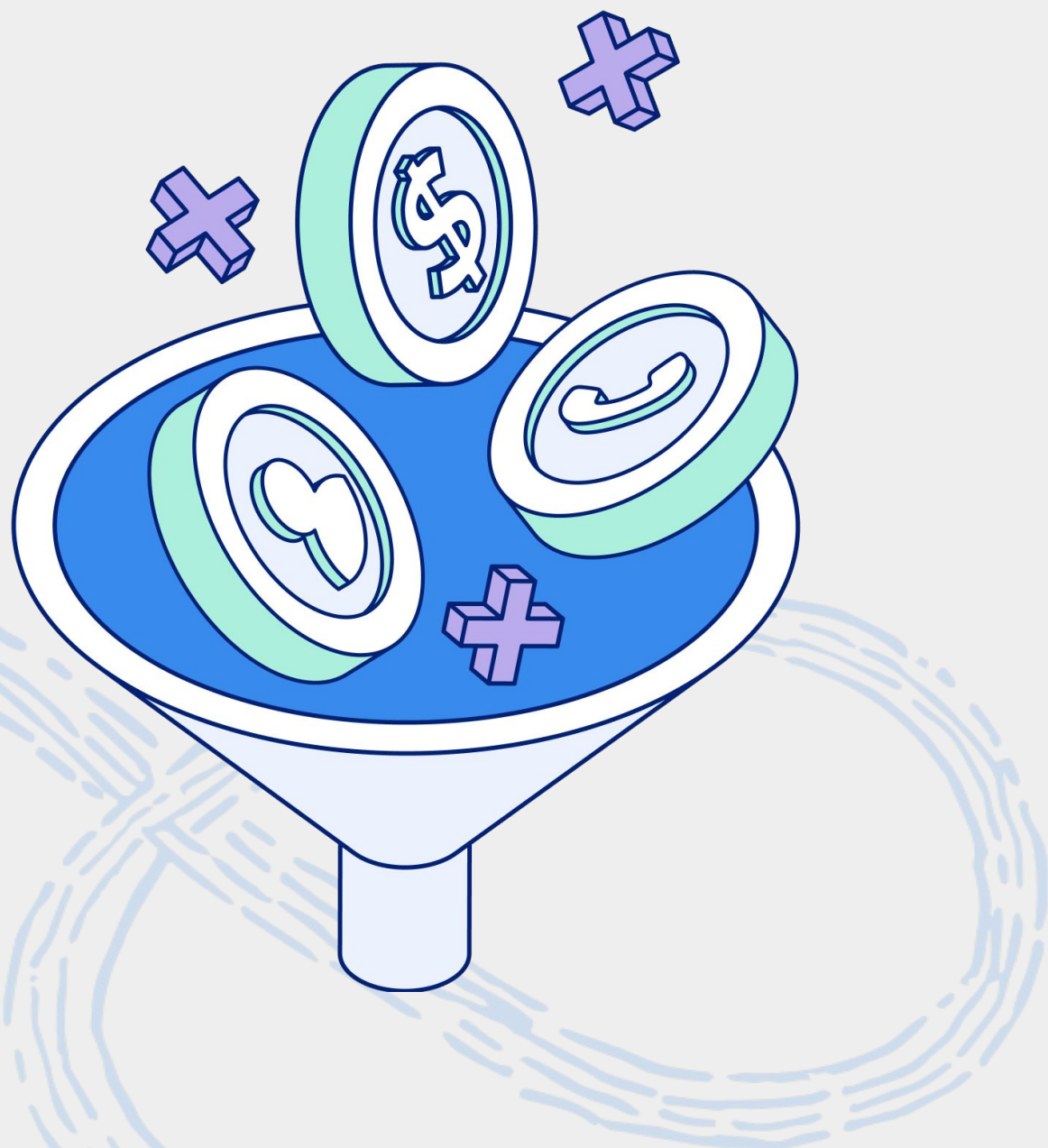
A great way to engender good feelings with your clients while simultaneously fulfilling one of your agency's own business needs is creating case studies. If it's too resource-intensive to make one for every client that sees positive results with your company, opt for the most compelling ones: clients who are well-known, have above-average results, or worked with you on particularly unique projects. (If you're looking for some inspiration on this front, [check our collection of CallRail case studies.](#))

You'll want to highlight how your marketing services not only generated short-term revenue, but also helped set them on a long-term path to marketing success. And, of course, be sure to circulate your case studies on social media and via email.

Case studies not only promote your agency's marketing prowess to new potential clients, they also showcase your customers' successful businesses and triumphant growth stories.

Want to try an easy, AI-assisted method of developing case studies? Take a call with your client and let CallRail's Conversation Intelligence generate a transcript. Copy and paste your transcript into a document and start editing it down, finding the best quotes, giving them a little polish, and weaving them together with some storytelling.

For an even faster workflow, try feeding the transcript directly into an AI writing tool such as Jasper or chatGPT. But be careful—your results may vary depending on your prompts, and we still recommend a healthy dose of editing after these tools do their work.



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“The purpose of a business is to create a customer who creates customers.”

- *Shiv Singh, former VP of Global Brand and Marketing Transformation at Visa*



7

Link up with complementary businesses for referrals

Company partnerships are a less client-facing method of generating referrals. The key here is to find services you don't offer, and have no plans of offering any time soon (or ever). A simple way to do this is to track service offerings your clients ask for frequently, but not so frequently that your CEO wants to invest resources into making it a full-fledged service offering.

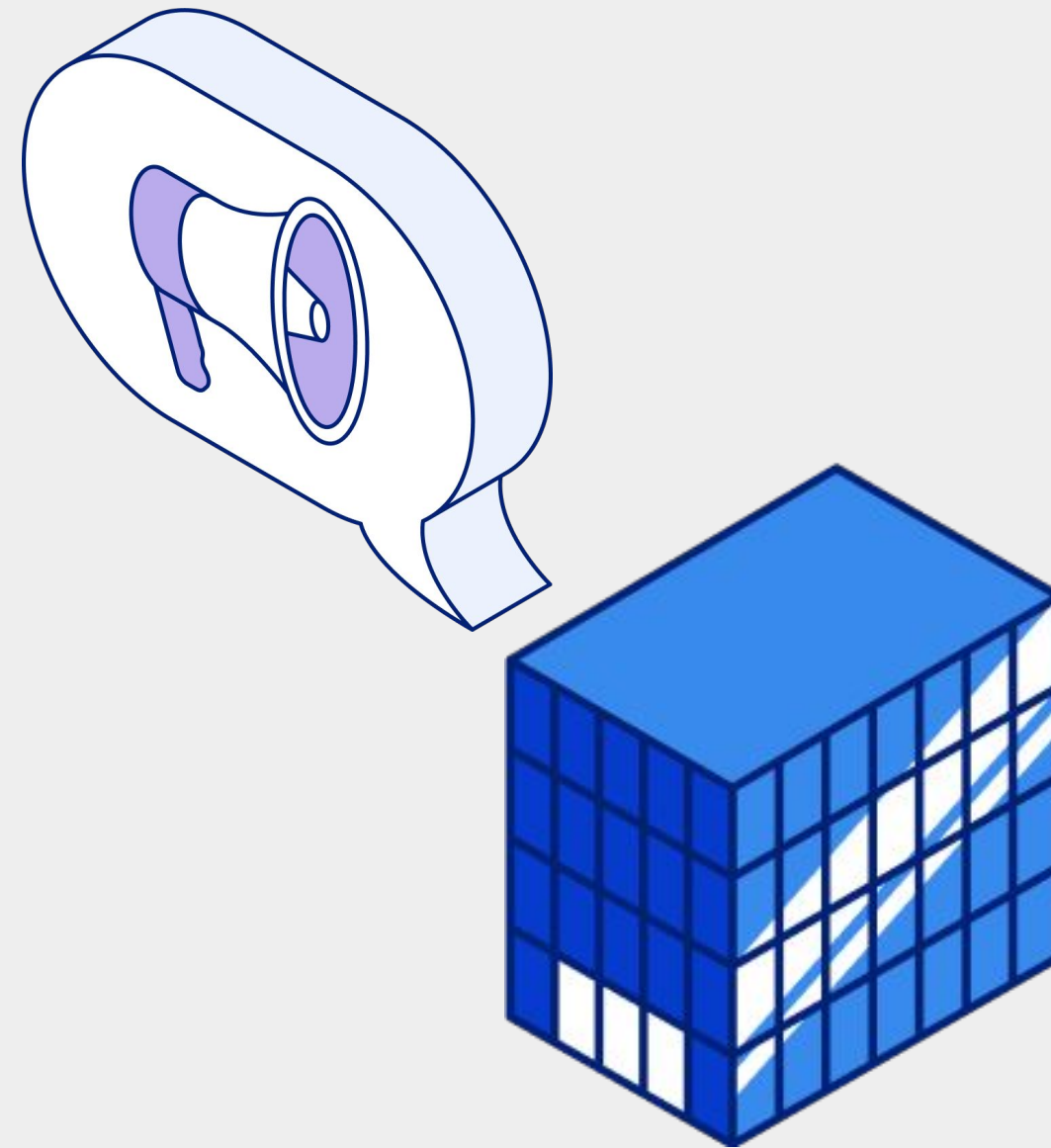
For example, if you run a small agency strictly focused on web development, but you have clients asking for SEO services, you could find an SEO agency partner who doesn't offer web development. In doing so, you open up your pool of potential clients without having to rely on your own clients to do the referring. Plus, your agency partner will do vetting on your behalf to make sure the client is a good fit, which makes for a bit less work on your end.

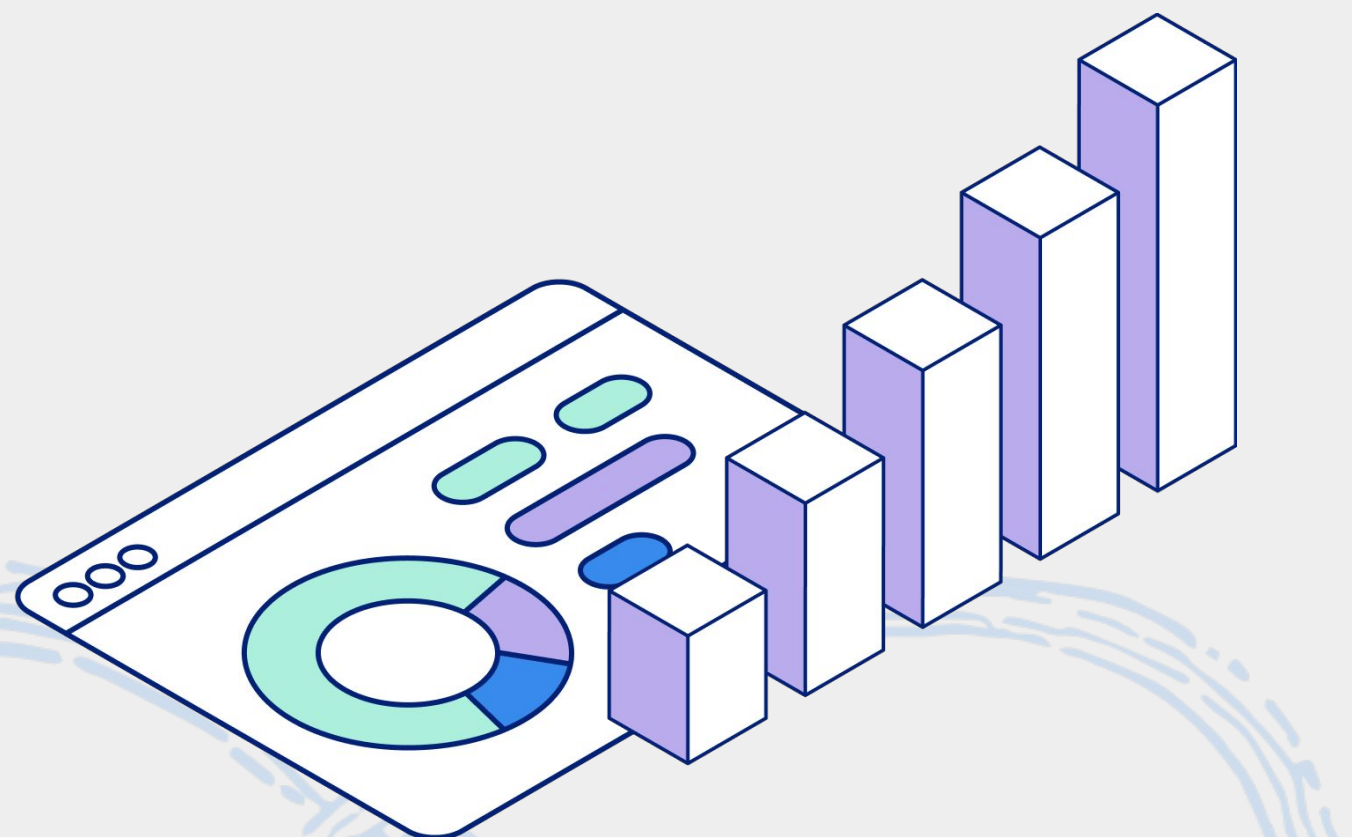
Part 2: Use Data Storytelling to Prove Your Agency's Value

It's 2023, and digital marketing isn't groundbreaking anymore—especially for agencies. The industry has advanced to a point where if you aren't doing some kind of digital marketing for your clients, you're falling behind the times (and your competitors).

But simply offering digital marketing services doesn't cut it either. There are hundreds upon hundreds of marketing agencies in the United States alone, so differentiation is key. But what's an agency to do when it's hard to stand out through just your service offerings? Sure, great brand messaging and a unique approach can help. But at the end of the day, most agencies offer essentially the same range of services.

Your potential clients are no longer going to be impressed by SEO or paid media savvy alone. They need to see real results, and you need to be able to establish trust and prove the value of your work. That's where great data storytelling comes in: When done right, clients will view your agency as the indispensable business partner you are.





What is data-driven marketing?

First, it's important to make sure your clients actually understand what you're talking about. Agency-client communication crumbles when there's too much jargon, so explain things simply and in terms that are relevant to their businesses.

You can start with a simple definition: "Data-driven marketing is an approach that uses analytics to prove your marketing efforts are working, better allocate resources, and find opportunities for growth." From there, you can narrow your definition to better fit the specific industry or work that's most relevant to your client.

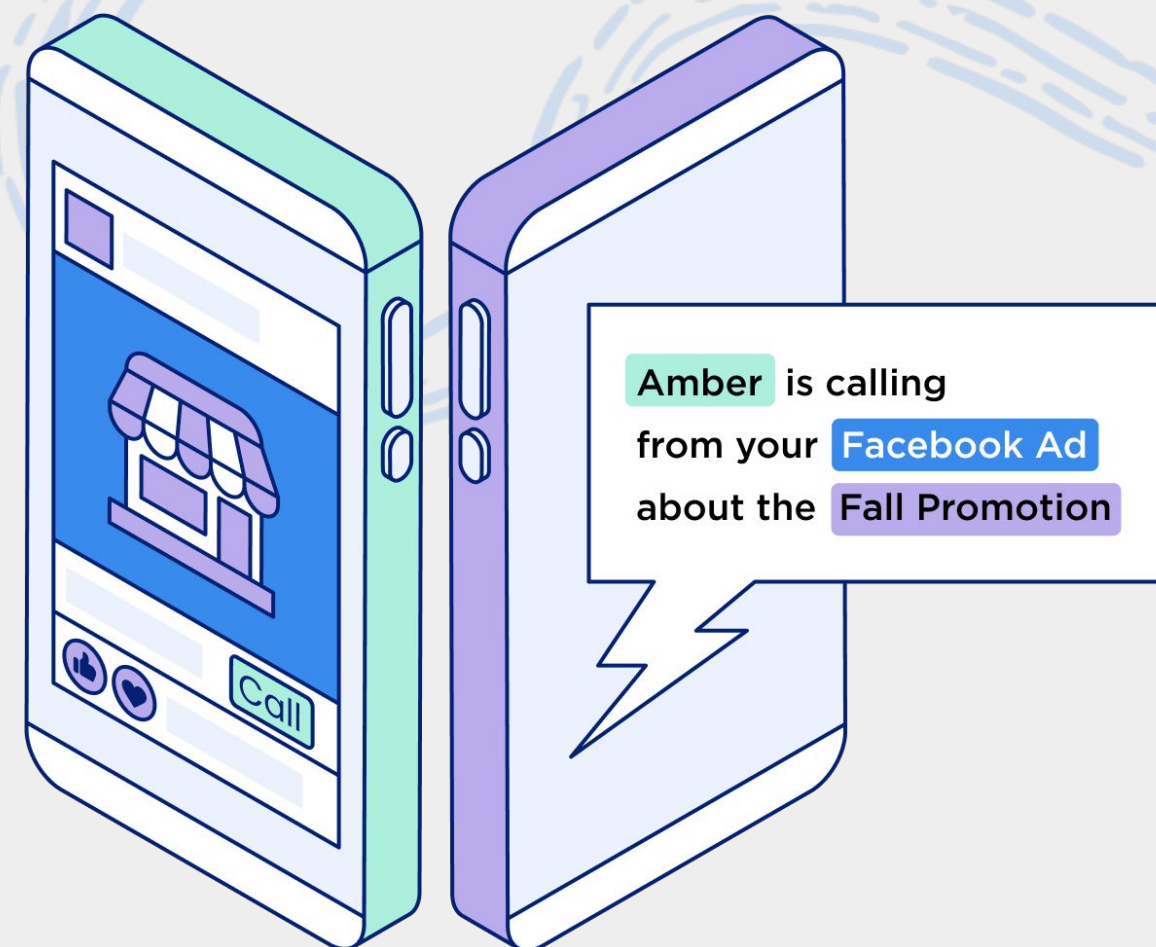
In an agency setting, data-driven marketing relies heavily on reporting. While the metrics included in each report will largely depend on the client or the project, here are some rules of thumb worth following:

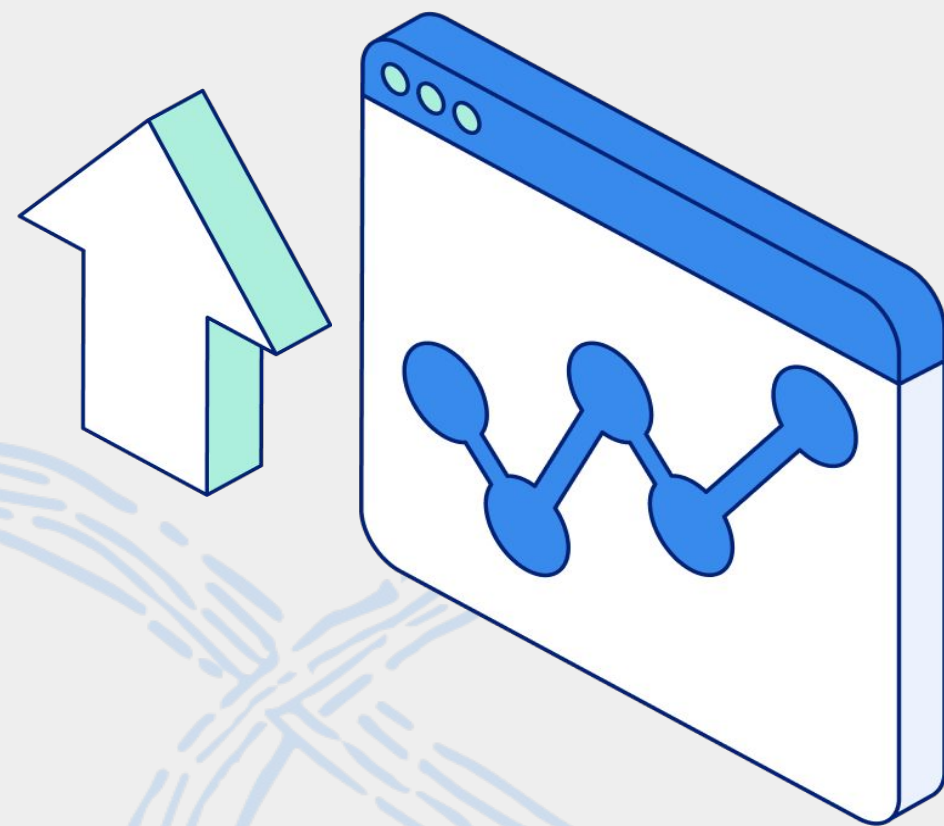
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Avoid vanity metrics

As your clients become more in-tune with digital marketing and analytics themselves, they'll become more critical of the data you choose to present to them. (And rightfully so!)

To stay transparent from the get-go, steer clear of vanity metrics. These are metrics that only offer a surface-level analysis of marketing campaigns, and can leave your clients demanding better proof of attribution. Instead, make sure your reports turn your vanity metrics into actionable metrics that prove the value of your work.





2

Beef up your presentations

It may be tempting to just put some charts and text boxes in a Powerpoint and call it a day, but well-planned presentations really do make a difference when it comes to winning over key stakeholders. Even the most amazing data findings can easily get buried in a presentation lacking narrative, context, or human-friendly design.

For example, many marketers will gravitate toward the ubiquitous pie chart for their presentations. But depending on what point you are trying to get across, it's important to choose charts strategically.

Similarly, if your presentation includes subjective language instead of hard numbers, your key stakeholders won't be impressed. For example, instead of saying "website traffic grew this quarter", say "website traffic increased by 15%" accompanied by the correct graphic.

And of course, there's the little things like color selection that can make a huge difference in how much information your audience retains. This is particularly true if you work with clients from other countries and cultures.

Check out some more data presentation tips to make sure your findings are presented as effectively as possible.

#1: Tell a story with your data

People are more inclined to listen to what you have to say when they feel invested in a structured storyline. It's why we love to watch films, but quickly lose interest when our friends tell a scatterbrained story about "that one time in Vegas."

Use your data to craft a presentation that doesn't just present information, but also guides your client toward a truth or solution for a problem. Use tension strategically to both keep their attention and keep you in control of the room.

Check out more presentation tips at callrail.com/blog/data-presentation-agency-best-practices/

#2: Pick a topic and stick to it

Tailor your data visualization choices based on who you're presenting to and what they care about. A money-minded COO, for example, probably doesn't care much about how many impressions your display ad campaign earned, but they'd love to know how many new leads the website earned during and after the campaign.

Choose the metrics that will resonate with your audience, and leave out any fluff—it's distracting and will take away from your core message.

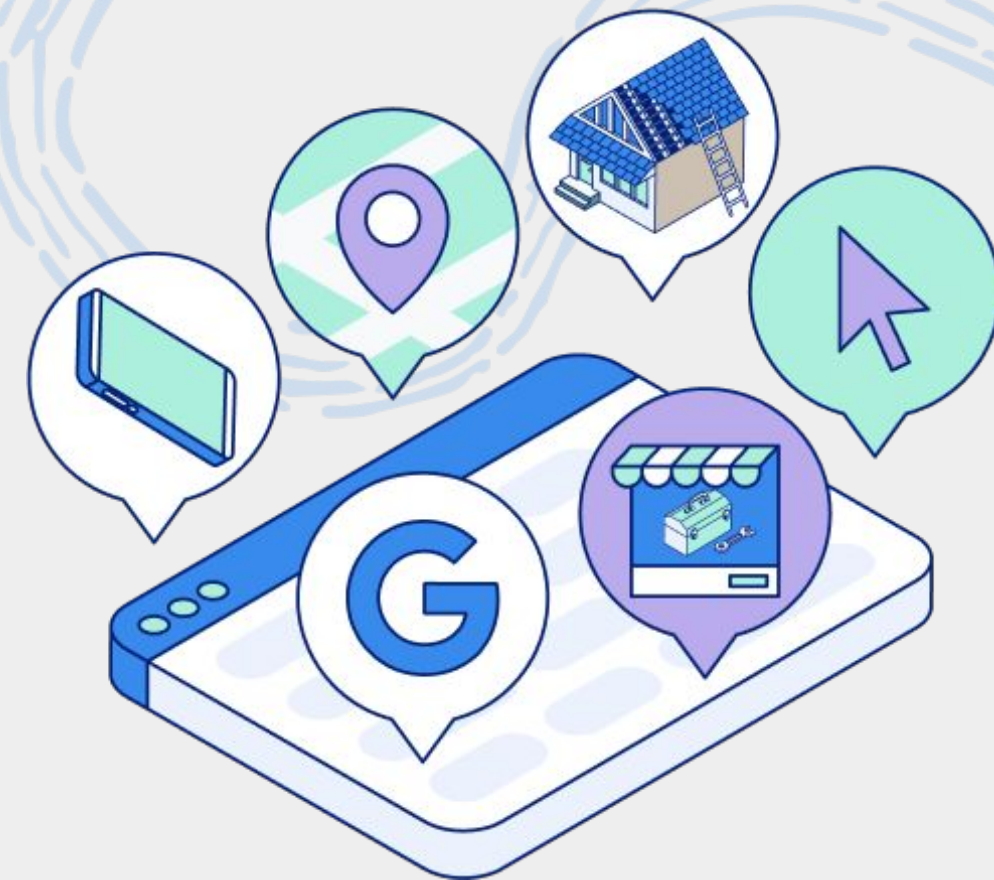
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Consider all forms of user engagement

Calculating ROI is important, but if you want to stand out, consider the other important user engagement signals.

You can pretty easily figure out CPC (cost per click) for a search engine marketing campaign. But what about measuring the effectiveness of landing page content? (For metrics, think time on page or bounce rate.)

Including this ‘softer’ information can help you look past more obvious metrics like CPC, and provide your clients with helpful feedback about what kind of content resonates best with their audience.





4

Pull data from every layer of the marketing tech stack

Making reports can be an outright slog. Logging into every tool, CRM, and database to pull metrics and coalesce them into some sort of slideshow or dashboard that makes sense? It takes hours upon hours' worth of work—time that could frankly be better spent creating, investigating, or fine-tuning actual marketing campaigns.

Gratefully, there are tools and integrations to help automate that work for you. If your client uses a CRM such as Salesforce or HubSpot, take advantage of the many integrations (including the CallRail integrations) and have all of your marketing data piped into a single system of record. Set up your dashboards there and build comprehensive reports across all of your clients' data.

If they're not using a CRM, or if their CRM of choice doesn't have the right integrations or reporting capabilities, don't despair! Tools created specifically to fill this arduous reporting need like [DashThis](#) (which conveniently has a CallRail integration) can fully automate the process of uniting your data and building beautiful, cross-cutting dashboards for your clients.



“Half the money I spend on advertising is wasted; the trouble is I don't know which half.”

- John Wanamaker, early 1900s



5

Use both quantitative AND qualitative marketing data

In data-driven marketing, we tend to get hung up on quantitative (‘how many?’) data, but qualitative (‘why?’) data can be equally insightful. In fact, qualitative data can be far more useful than quantitative data when it comes to explaining the numbers you see every day on your marketing analytics dashboard

For example, consider this [case study with Texas-based Brand Ranch Media](#). They insist on using CallRail’s Call Tracking with all of their clients to accurately track the attribution of phone calls to marketing campaigns. But they realized they were sitting on an untapped gold mine of qualitative data—call recordings.

By adding AI-based Conversation Intelligence to their tech stack, Brand Ranch can filter through their clients’ most successful conversations, or their lost opportunities, and determine what topics, concerns, or keywords will bring in more qualified leads. In CEO Jimbo Fogarty’s own words:

”

“The quality of our ad campaigns improved. Our client revenue improved. Even when people weren’t spending money, we continued to grow. Conversation Intelligence provides greater insight into what’s really happening and saves our clients some time by not having to sit there and listen to calls.”

- *Jimbo Fogarty*



Webfirm realized that CallRail’s call recording feature allowed them to find the gaps in their team’s expertise that were causing leads to be lost. This qualitative data—used alongside their quantitative analysis—helped Webfirm go above and beyond your average digital agency, proving their value and trustworthiness in the process.

All of these examples show how, when done right, data-driven marketing can elevate your agency to become a trusted partner to your clients. And in today’s agency climate, there’s nothing more important.

But while you may know the value of data-driven marketing, convincing your clients to focus on the metrics that matter most to their business can be challenging. Fortunately, knowing how to teach your clients which metrics they should pay attention to is a surefire way to earn their trust and drive results.

Chapter 3

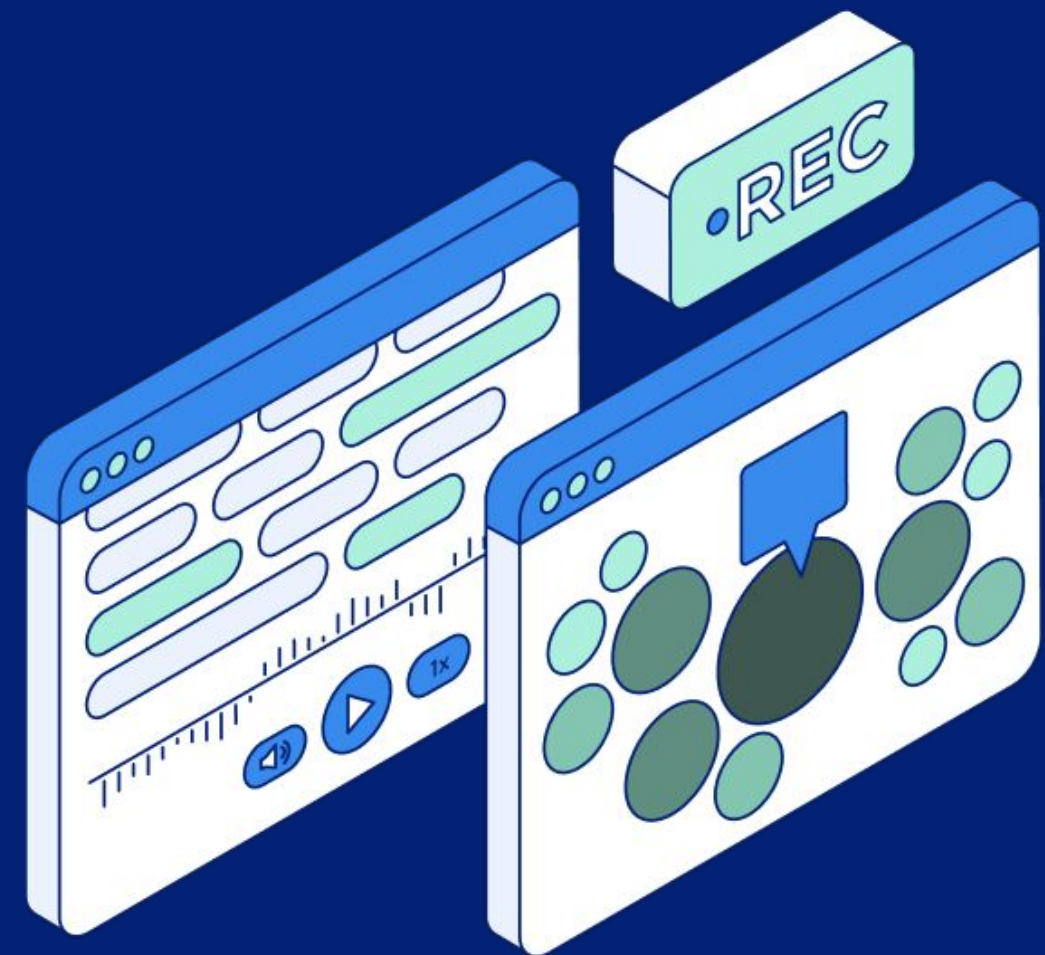
How To Help Your Clients Focus On The Marketing Metrics That Really Matter

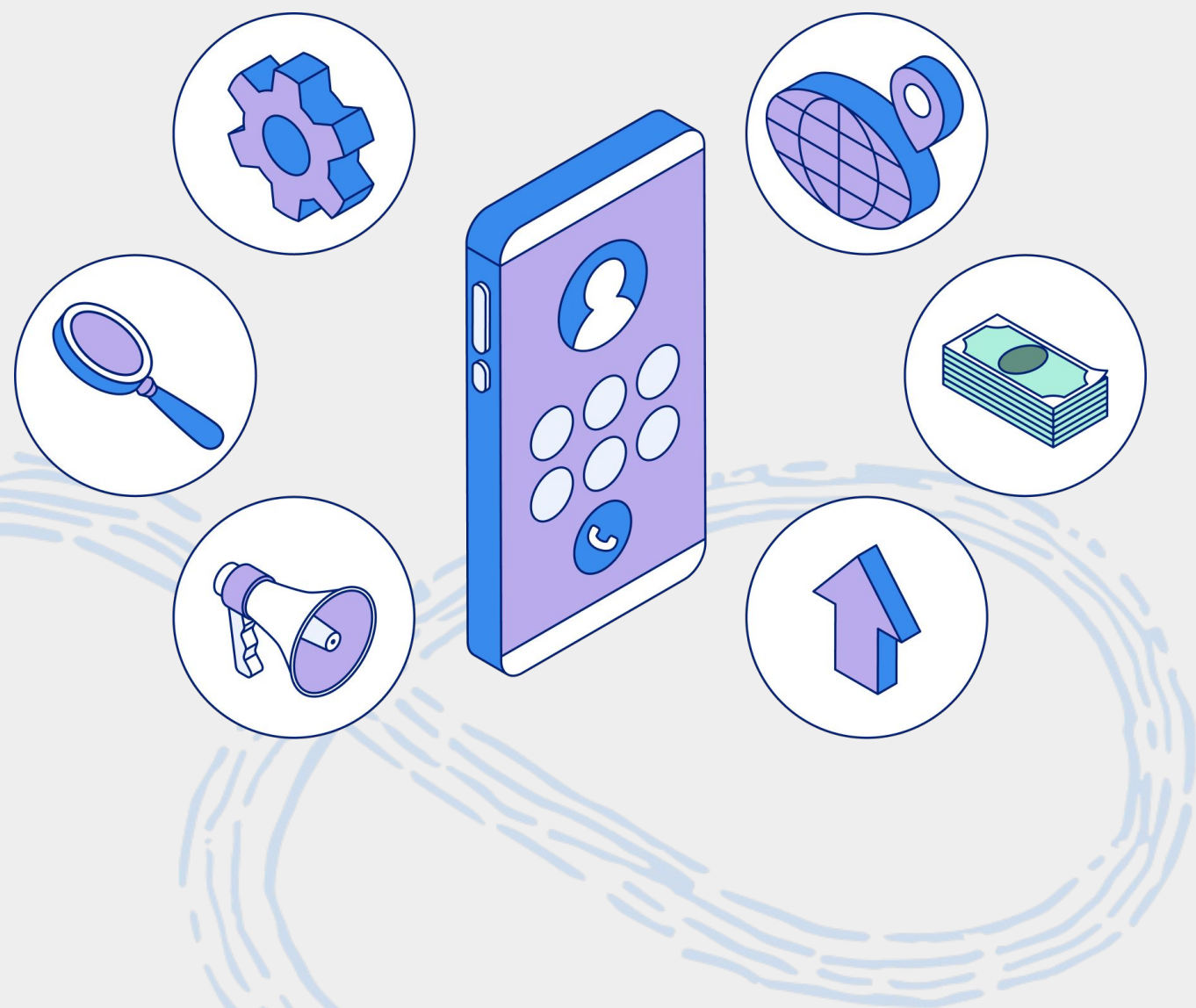
There's a debate in the baseball world around one very conventional statistic: Pitcher wins and losses.

For decades, this metric has been considered a key indicator of a pitcher's value. But there's a glaring problem here: A pitcher has no control over his team's offensive output. He could lose a game by a score of 1-0 and he could win a game by a score of 10-9—in other words, earning a win for a performance nine times worse than the game for which he received a mark in the loss column.

In much the same way, when it comes to marketing, many businesses still cling to 'sacred cow' conventional metrics. Maybe your clients are this way—perhaps their previous marketing agency or in-house marketing person was fixated on one of these metrics (like pageviews or raw leads).

How do you get your client to instead pay attention to more meaningful marketing metrics?





1

Clearly, constantly delineate between marketing conversion types

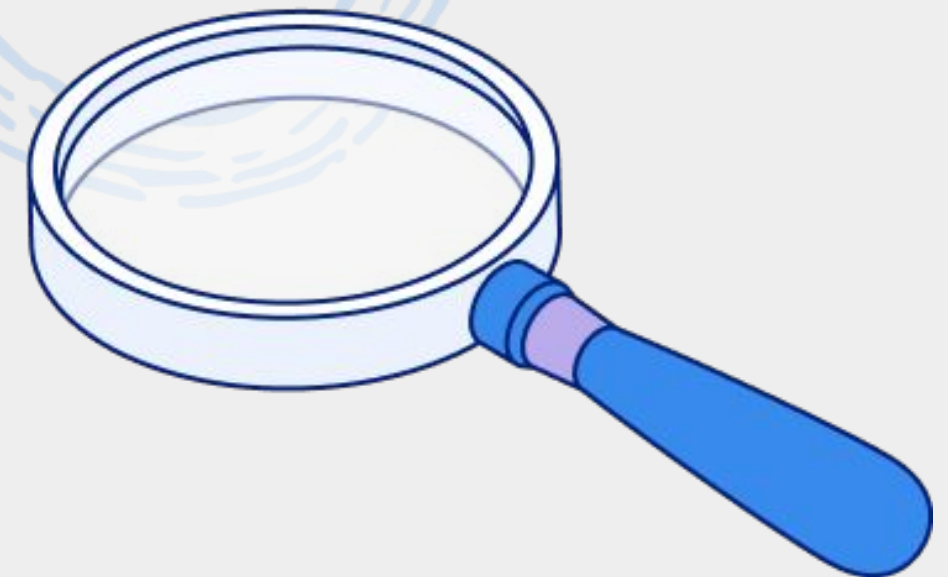
Obviously, conversion types vary greatly in quality. If someone downloads a white paper from your client's website, that's great—you've got another prospect you can nurture.

But it's obviously way more valuable when someone fills out a form requesting a consultation from your client's business. So, if you have any kind of lead-scoring in place for your client, the consultation form will eclipse the white paper download in terms of points ascribed to the conversion.

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“The Internet of Things will collect and transmit unprecedented amounts of data. This poses a big problem for marketers, who can end up down a rabbit hole of fruitless information. Now, more than ever, marketers need to be measuring the right things.”

- *Linda J. Popky,
founder of Leverage2Market Associates*





2

Don't be afraid of anecdotal proof points to give life to marketing metrics

In some circles, 'anecdotal' may as well begin with a scarlet-colored 'A.' But anecdotes can often be powerful to your clients, who may struggle to grasp quality while sifting through a sterile data set.

When you can storytell—proving that a particular campaign produced a particular customer—your clients are more likely to connect the dots between your agency's work and their growth as a business. Agencies are using CallRail do this every day, and can quickly sort calls by AI-spotted keywords or using Call Summaries—glanceable 3-5-sentence summaries of every single call—and send them over to their clients in order to demonstrate the impact of a campaign or sales script they've designed.

3

Get clear (and stay clear) on client business goals

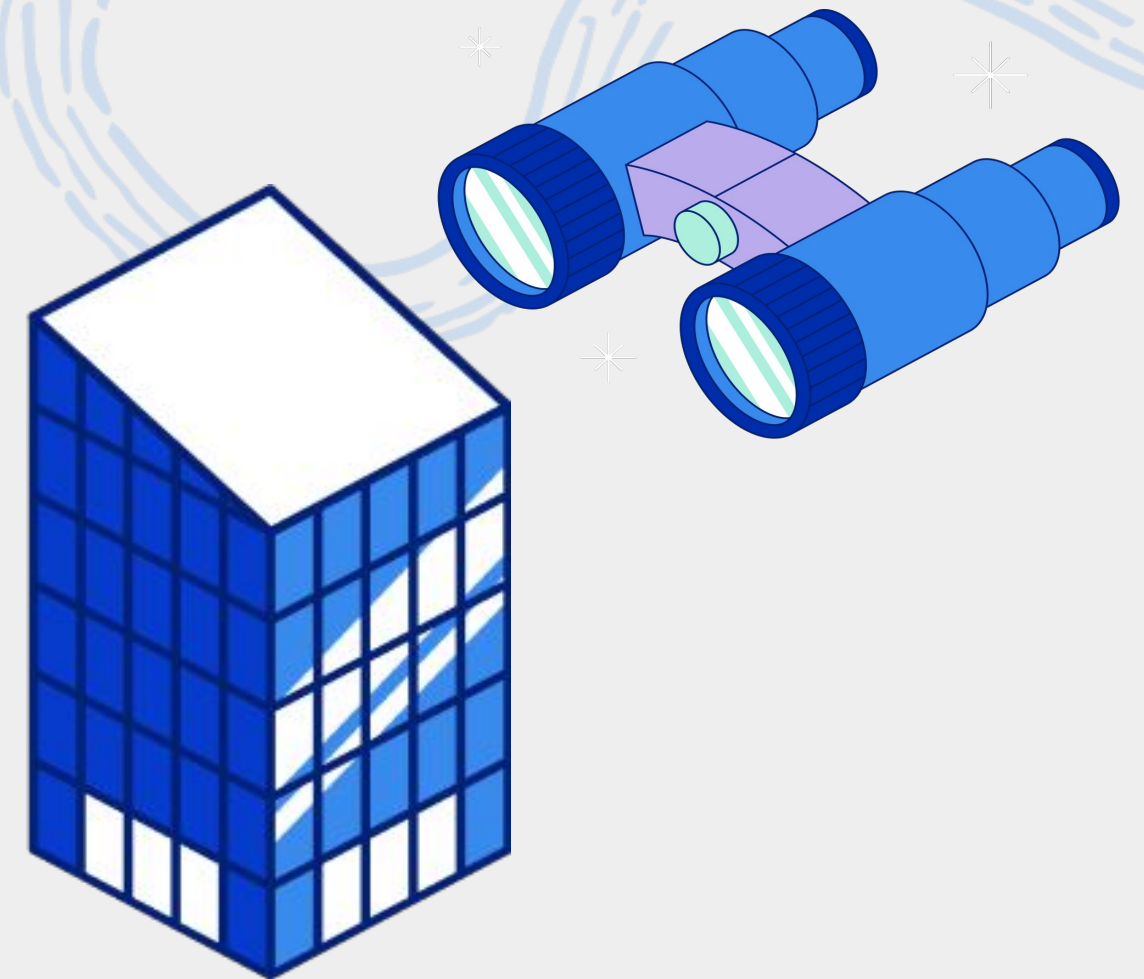
Maybe this is obvious, but “we need a better website” and “we need help with our Google Ads campaigns” are not goals. If you can dive deep with your clients to understand their strategic business goals, your agency will easily provide infinitely more value than you would facelifting a website or re-optimizing Google Ads campaigns. You could also improve client retention, by directly tying your activities to their core business goals.

Here’s how that might work.

Let’s say your client is an optometrist with three locations around town. And let’s say two primary business goals for the upcoming year are increasing booked appointments at their newest (and slowest) office, as well as moving more merchandise across all of their locations.

Working backward from those goals, it wouldn’t make too much sense to prioritize pageviews as a KPI. Similarly, it would be odd to report on social media followers to this client, though both of these metrics may very well augment your core efforts.

Let’s instead isolate these goals and consider how you might be able to support them.



Goal 1: Increase booked appointments to a particular location

To support this goal, your marketing agency is likely to run some geo-targeted paid advertising on Google and Facebook, focusing on a five- or seven-mile radius around the office you're hoping to boost with more business.

Prospects who click through on these ads might book an appointment through your client's website. And if that's the case, it's obviously important to set up attribution for booked appointments.

Many prospects will probably also call into your client's business after clicking through on one of these paid ads and perusing their website. If so, it will be critical to set up call tracking to make sure you're capturing these prospects, too, and getting credit for them.

When it comes to reporting, you should be able to provide an exact number of booked appointments your paid campaigns produced.

You could also provide a figure for Cost Per Lead by dividing total spend by appointments booked online, plus appointments booked via inbound call. (Pro tip: You can do this right inside CallRail, without having to cobble together reports from various sources.)

For extra credit, you could further support this client goal by creating an answering script for office staff. Conversation Intelligence can help you make light work of this task: each call is automatically labeled with positive or negative sentiment. Taking a look at strongly positive conversations that ended in bookings is a shortcut to discovering exactly which talking points bring in customers.




Goal 2: Sell more merchandise

Selling more merchandise may seem like a difficult goal for a digital marketing agency to support, especially if your optometrist client doesn't have a great e-commerce solution. The simplest way for the business to chip away at this goal is probably through merchandising and sales training for the office staff, and it's likely that neither activity is among your agency's core competencies.

However, your agency is probably already highly familiar with something that will definitely boost sales: Email marketing.

Perhaps your agency could design a new email template for your client's general drip campaign, which includes a 'spectacle highlight.' Or maybe you could set up a campaign which emailed patients exactly one year after their last glasses purchase with messaging that encouraged them to get familiar with new styles before their next appointment. For these activities, you could report on open rates and click-through rates as the KPIs that support the client's particular business goal.

Getting your client to focus on marketing metrics like these, rather than vanity metrics, will help to make your agency more indispensable. And effort like this goes a long way towards showing how each activity your agency pursues is not arbitrary, but rather closely tailored to your client's specific goals.

 Email Metrics		 Social Metrics		 Paid Search Metrics	
Vanity	Better	Vanity	Better	Vanity	Better
Bounce Rate	Leads Generated	Retweets/ Shares	Number of Leads	Impressions	Number of Leads
Sharing Stats	Click Through Rate	Friends/ Followers	Closed Details	Ad Position	Cost Per Lead
Open Rate	Cost Per Lead	Number of Posts	Purchasing Behavior	Click Through Rate	Cost Per Acquisition
Deliverability Rat	Lead Quality		Referrals	Cost Per Click	



Chapter 4

How Real Agencies Use Call Tracking To Go Above And Beyond For Their Clients

So you've streamlined your marketing strategy, implemented data-driven marketing, and are helping your clients focus on the metrics that truly matter to their businesses. How do you go the extra mile to keep your clients in it for the long haul?

By adding call tracking and Conversation Intelligence to your agency's tech stack, you can unearth surprising insights that make a world of difference for your clients' businesses and, by extension, your churn rate. But don't just take our word for it—our agency clients' success stories speak for themselves.

1

All Points Digital builds custom solutions for tricky attribution problems

As computer science majors in college, you wouldn't necessarily expect Jamie and Jason Mazur to start All Points Digital, a successful digital marketing agency, together. But that's exactly what made them so good at what they call the "nerd stuff"—paid media, search engine advertising, and strategic content marketing.

All Points Digital was asking clients to spend tens of thousands of dollars a month on Google Ads campaigns and other types of paid initiatives. They needed to be able to give them a hard return on investment for their spend.


Using the CallRail API to build custom integrations into their customers' CRMs, All Points Digital was able to definitively connect calls to sales, even in their clients' tricky ecosystems where sales cycles could take over a year.

[Read the Case Study](#)

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“As an agency, we understood very early on the need to understand where calls were coming from. But the next question was, ‘What is the ultimate outcome of these calls in terms of dollars, in terms of whether they actually are conversions or not?’”

- All Points Digital



“When we notice a client’s front desk isn’t answering calls, we know they’re going to have a hard time driving revenue from any paid programs, whether they try Google Ads, Microsoft Advertising, Facebook ads, PatientClicks, another agency, or in-house efforts. It won’t matter, right?”

- **Christian Krohn, CEO**

2

CallRail is a key ingredient in PatientClicks’ secret sauce

PatientClicks, an agency focusing on the healthcare industry, uses CallRail and landing page conversion data to create the special report they consider their “secret sauce”—the Did Not Book report.

Sometimes, this report uncovers hidden gaps in service that negatively impact marketing effectiveness.

The report helps PatientClicks attract and retain clients. “It gives us a very significant competitive edge. A lot of our competitors can’t deliver that data. And because we offer transparency, our clients can answer definitively, ‘Am I making a return on my investment with PatientClicks or not?’”

[Read the Case Study](#)

3

CallRail helped Dental Health Associates build trust with their clients

Sara Johnson is the Marketing Manager of Dental Health Associates (DHA)—a multi-location, physician-owned practice based in Madison, Wisconsin. “We invest a lot of money in digital marketing and events,” she says. But not long ago, “It was very challenging for our dentists to see the value in what we were doing, and I couldn’t identify what was bringing people in.”

A digital marketing partner recommended CallRail. Hoping it could help her fill DHA’s call attribution gaps, she decided to try the platform. “Now we use CallRail for all our clinics,” Sara notes.

Now that she knows which Google Ads campaigns drive calls, texts, and form submissions, she uses Call Tracking and Form Tracking to fine-tune marketing spend. “Doctors really appreciate that I can identify patterns and either stop campaigns or invest more in them. That gives them more of a trust factor for our marketing.”

[Read the Case Study](#)

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“It’s helped us demonstrate where patients come from, what keywords they’re using, and which leads are most valuable.”

- **Dental Health Associates**

“It’s really easy to tie that lead directly to the change on the site,” said Workshop SEO Lead Tucker Hottes. “It’s right there in the CallRail dashboard and came through this call tracking number.”

- **Tucker Hottes**
Workshop Digital SEO Lead



4

Workshop Digital solves client challenges creatively with CallRail

With a focus on close collaboration and reporting transparency, Workshop Digital is a marketing agency that prides itself on helping clients market smarter. They’ve been CallRail customers for years, using the platform to help their clients test ideas, get more from their money, and focus on their highest-value leads.

For one customer, they ran several tests, each one placing a phone number in a strategic location on their clients’ website. One test doubled the number of leads from their desktop homepage with the same amount of traffic—even leading to a six-figure purchase.

For a different client, Workshop Digital was able to optimize high-performing keywords and pause others that were getting calls but not new bookings using call insights from Conversation Intelligence.

[Read the Case Study](#)

5

CallRail helped elevate Above the Bar from marketing agency to business consultant

Before launching her own digital marketing agency, Lindsay Marty was employed by a large national legal marketing company. Digging into a pay-per-click project, she discovered CallRail Call Tracking. “I was blown away by the technology and the level of transparency I could offer clients, including the exact ROI for their marketing dollars.”

That’s when Lindsay decided, “Gosh, we have to use CallRail for all our clients.” When her employer disagreed, Lindsay was so adamant she set off on her own and ultimately implemented CallRail for every single one of her website clients.

In addition to helping Lindsay’s team prove which ads, campaigns, and keywords make their clients’ phones ring, CallRail has helped Above the Bar hone its competitive edge.

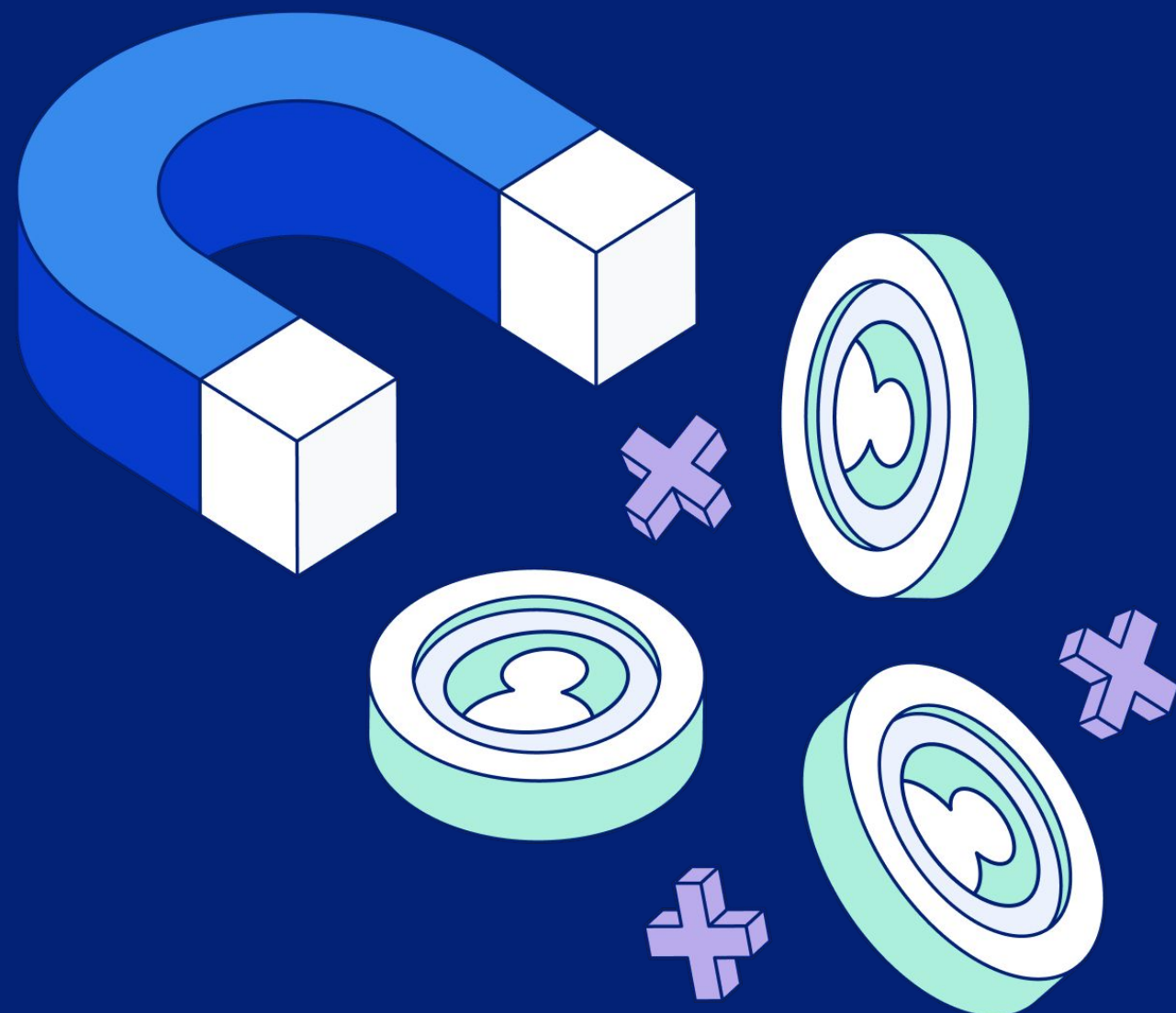
[Read the Case Study](#)

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“CallRail is the main reason our clients think of Above the Bar as a business consultant and not just another digital marketing agency,” notes Lindsay. “It’s transformed what we do in a way I wasn’t even expecting. Being able to show clients each customer’s complete journey—it’s powerful.”

Client retention is another CallRail benefit. “It makes us more sticky,” Lindsay added. “We haven’t had any clients leave us since we started using the platform.”

- **Lindsey Marty,**
Above the Bar



Conclusion

Client retention can make or break your agency. In order to stay competitive in today's crowded agency marketplace, it's critical that you do whatever possible to minimize client churn.

Achieving this is a multi-step process. First, you need to establish processes to build rock-solid client relationships and communication. Then, you can evaluate how you're reporting to your clients on ROI and the other metrics that matter. And finally, fine-tune your data strategy and marketing tech stack to consistently provide your clients with customer service and results they simply can't get anywhere else.

With the right combination of planning, data, technology, and thoughtfulness, you can keep your clients in it for the long haul and grow your agency.

[Try CallRail free for 14-days](#)