

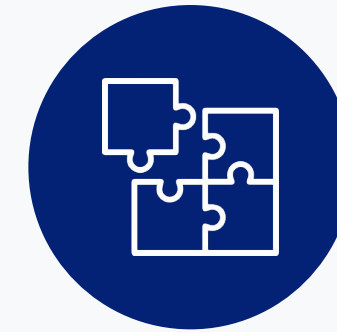
CallRail

Making the Dream Work with Team Work

How small businesses can keep leads
from falling through the cracks with
better communications



“Teamwork
makes the
dream work.”



At least this is the dream for most small-to-midsized businesses. But good teamwork requires good communication—and this is where many smaller businesses struggle, especially when it comes to tracking customer leads and communications

Even when using multiple technologies, small businesses lack the cohesive and integrated tools to support the teamwork necessary to make “the dream work.”



How are businesses communicating?

We wanted to find out which tools small and midsize businesses are currently using to collect leads, as well as how these tools help businesses create the best possible customer experience. To find out, we surveyed over six hundred professionals who regularly interact with their customers and prospects. We also looked at the kinds of experiences their communication tools create for customers and what kinds of business results they produce.

What are businesses doing to create a cohesive communication experience for customers and internal teams? And how are their efforts working? This report shares what we discovered about small business processes for tracking leads and customer communications, where they're succeeding or falling short, and what costs they incur when team communication falls apart and the dream doesn't work.

3 Top Takeaways

1. Small and midsize businesses rely on both modern and traditional technology to communicate with customers

SMBs are juggling a lot of communication channels and tools, but still relying on technologies that have been around for decades.

More than half of small business leaders say they use:



Many say they also use live chat (39%), video calls (32%), and social media messaging (27%).

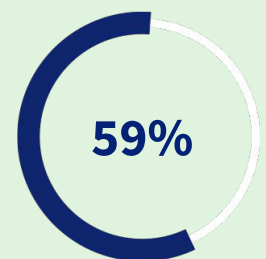
3 Top Takeaways

2. Most small and midsize businesses want better customer communication tools

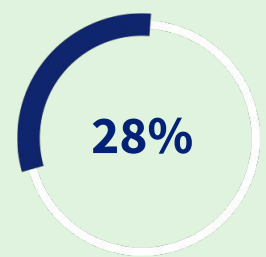
As the number of marketing channels expands—as well as the ways customers can communicate with businesses—many small businesses find themselves struggling to keep track of it all.



95% of business leaders want to improve their customer communications tools



59% say they sometimes miss prospect calls



28% say they often miss prospect calls

3. Poor communication is costing businesses

SMBs are wasting time and missing out on revenue due to communication issues. They lose or miss out on an average of:



16 hours per week tracking down information



\$161,594 in annual revenue from missed calls

\$149,035 due to slow response times

\$142,846 from communication issues



Businesses are juggling a lot of communication channels and tools

The number of marketing channels continues to grow, and so do the ways customers choose to reach out to businesses. Consequently, companies are losing track of customer calls and messages and missing opportunities to create positive customer experiences.

Small and mid-sized leaders say the primary way customers find their business is through:



46%
Search engines



44%
Organic social media



43%
Direct referral or former clients



38%
Word of mouth/name recognition



36%
Professional directory



34%
Online review sites (like Yelp)

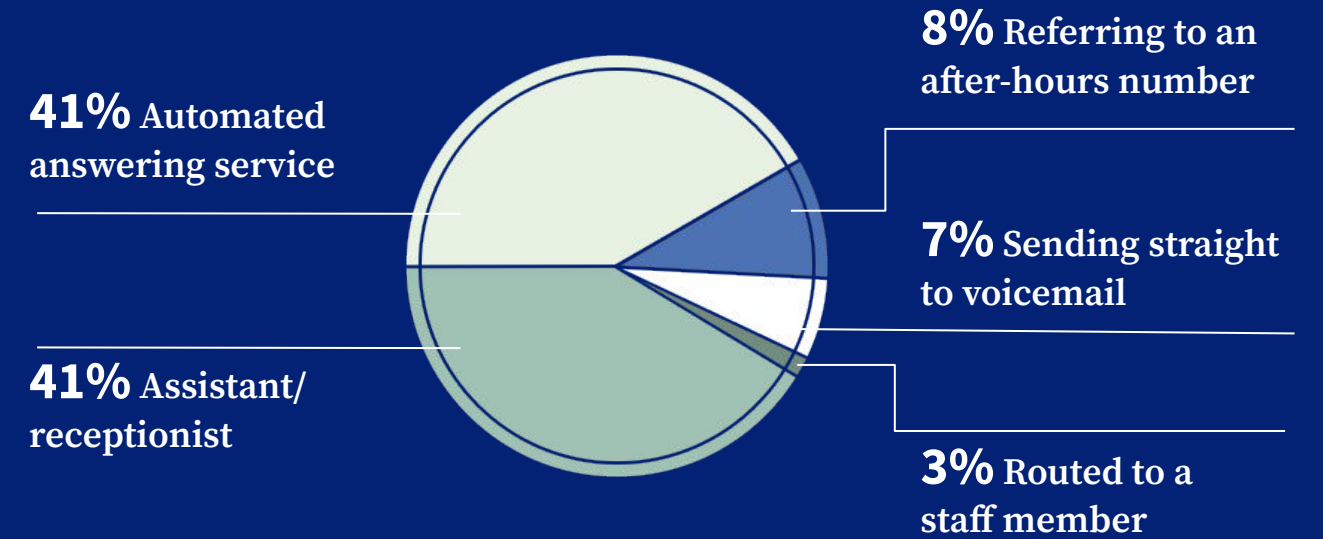


34%
TV advertisements

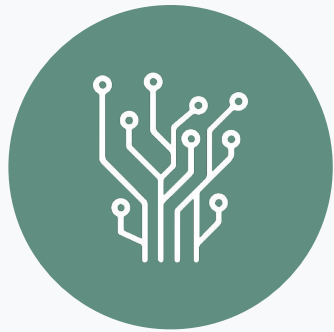
Small and midsized businesses report that customers and prospects contact their businesses using several methods, including:



When leads come in by phone, respondents answer the call by:

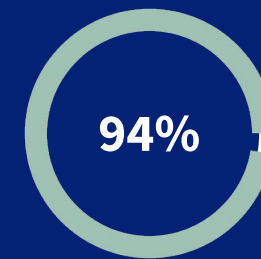


Unfortunately, most of these tools and channels aren't integrated. Without integration, records aren't centralized and it's hard to gather insights. Teams also aren't united in their communications, so customer communications and experiences suffer.

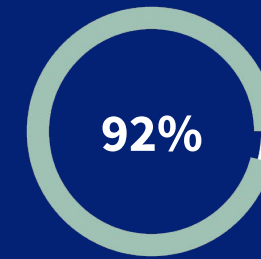


The Consequences of Too Many Channels and Tools

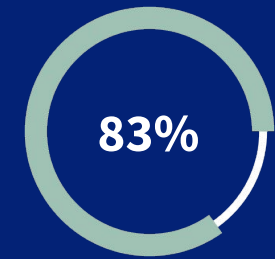
With so many channels and tools for communication, it's hard to track customer communications effectively. Some employees are overwhelmed by the number of tools. They also don't have notes about previous customer communications, making follow-ups difficult.



feel they have too many separate communications and/or contact management tools



of those agree that too many tools make onboarding difficult



agree that it's hard to integrate their existing tools

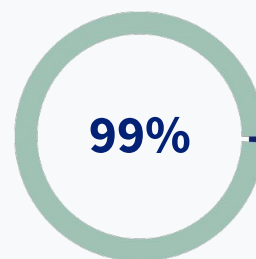
With so many separate communication tools, small businesses never know where calls are coming from or what drove a customer to reach out. Often, if a business wants to know how a prospect found them or why they've called previously, employees have to ask the customer. This takes up the employee's time and is not always a conversation the customer or prospect wants to have.

Customer-facing employees lack visibility

Employees often answer or return customer calls without any context or lead intelligence. This can create issues for both customers and employees.



60% of small businesses do not have visibility into the marketing source that drove a prospect to reach out



99% of small businesses say they always or sometimes have to ask prospects how they found their business when answering a call

As a result, **91%** say they spend valuable call time talking about why a prospect is calling. And, if they already knew the marketing source that drove them to reach out, 81% agree it would lead to more informed conversations and 87% agree it would allow them to provide better customer service.

In fact, **80%** admit they needed to ask a customer or prospect about who they talked to or what they talked about in a previous conversation. The result of this lack of visibility is that **72%** of small business employees say they have misspoken on a call to a customer or prospect because they did not have context from previous conversations.

Most employees see communication as a challenge

It is a well-known fact that customers expect fast response times or dislike repeating requests, as evidenced by research like [Microsoft's Global State of Customer Service report](#). Yet, communication misalignment can cause those needs to go unmet. And customer and employee frustrations can negatively impact business.

- **89%** of small business employees feel that misalignment around customer communications is an issue at their company
- **91%** do not believe their company takes this issue as seriously as it should



Businesses Need Better Tools to Track Customer Communications

Despite many small businesses acknowledging that communications are an issue, in most cases, less than half of SMBs are using technologies to track these leads and customer communications.

- **59%** use conversation intelligence software (software that uses artificial intelligence to analyze speech or text in order to derive data-driven insights from conversations)
- **40%** use tools to route calls
- **40%** have caller ID
- **36%** use call tracking software (software that tracks and records information from incoming phone calls, including marketing source)
- **32%** use call recording tools, and **86%** of those that record calls use software to create transcripts of the calls

Disconnected tools creates disconnected communications

A single location for communications and tracking intelligence can greatly benefit businesses, but currently only **47% of small businesses have a unified inbox** (a central inbox that combines phone calls and text and/or chat messages that is visible to your entire team).

**TORONTO
TEES**

Rescue Leads with a Centralized Communications Tool

For small businesses with more than one location, customer communications and orders can get even trickier. Toronto Tees was able to recover 15-20% of their lost leads when they started using CallRail's Lead Center. Funneling calls to a centralized location ensures no calls are lost and allows someone to transfer them to the correct store for order fulfillment.

Download the case study. [→](#)

Lack of recording results in call chaos

Without automated tracking and recording tools, many small and mid-sized businesses miss calls and use manual processes that result in confusion and misplaced information.

Of those that don't record calls:



95% rely heavily on manually taken notes from colleagues about calls

90% do not have a unified location to store notes

75% agree that these notes make it hard to find key information

Of those that often or sometimes miss calls:

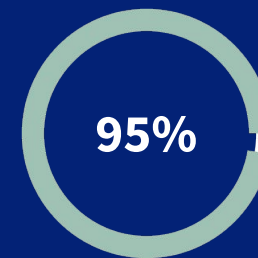
- **59%** don't have a dedicated phone line for business calls
- **53%** don't have a centralized way to see incoming calls so the team can cover for a colleague who is unavailable
- **45%** don't have a dedicated person to answer calls
- **42%** say calls are missed because people are away from the office
- **33%** say calls are missed due to low staff bandwidth

Fortunately, there are tools that can record calls, track communication sources, store notes from calls, and more. Call tracking and lead tracking — [such as those offered by CallRail](#) — are some of the solutions that help businesses send messages, get reporting, see attributions, and manage communications. These ensure businesses avoid missing calls, losing information, and letting leads slip through the cracks.

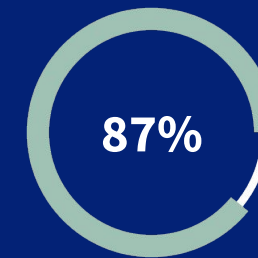


Without the Right Tools the Customer and Employee Experience Suffers

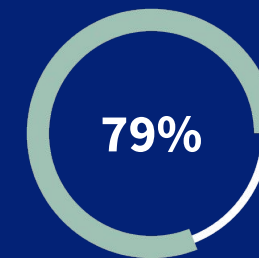
Manual processes and the use of multiple communication tools and channels that don't integrate often result in frustrating experiences for both customers and employees.



95%
of small business feel they tell customers to repeat information in separate conversations



87%
of small businesses often or sometimes miss prospect or customer calls



79%
of small businesses often or sometimes miss customer messages

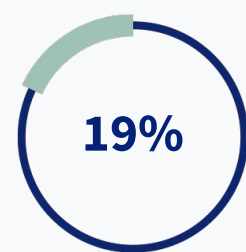
Lack of internal alignment is frustrating small and mid-sized teams

When there is no internal alignment of your customer communication practices—like how to keep track of and respond to customer communications—employees often don't know what the expectations are. They don't know quickly they need to respond, whose job it is to respond, or how to find out what the customer is calling or messaging about. This creates frustration for both employees and customers.

- **70%** of businesses have felt frustrated due to a lack of internal alignment around customer communication
- **78%** of businesses have experienced customer frustration due to a lack of internal alignment around communication
- **69%** of businesses worry that a lack of alignment on customer conversations makes them look unprofessional

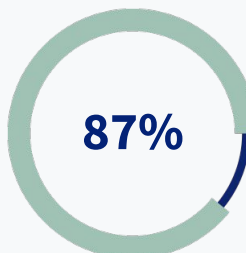
Lost or missed information causes delays and negative experiences

Today's customers have expectations about the kinds of experiences they should have with businesses. Poor communication processes make it hard to meet high customer expectations.



19%

of small businesses always know the last team member to communicate with a customer



87%

say they often or sometimes put prospects and customers on hold while they track down information

As a result, 90% have experienced negative customer feedback over long hold times and 73% have had to delay their response to a customer chat or email while they tracked down information. Of those, 90% have experienced negative customer feedback over slow response times.

It's not that businesses aren't trying. Employees waste a lot of time and go to a lot of trouble trying to get the right information to prospects and customers. On average, they spend **16 hours per week tracking down information about previous interactions** to prepare for customer calls. In addition, they struggle with issues like:

- **85%** say they can't find the information they need from previous conversations often or sometimes
- **78%** have had to contact an out-of-office colleague for information
- **73%** say that if an employee leaves the company, there's no easy way to gather records of their conversations with customers and prospects

Note-Taking Solutions Save Time and Leads

For SMB employees who have ever wondered if a colleague called a customer back—or remembered taking a note but couldn't find it—a solution like CallRail's Lead Center can store call data and manual notes. When Screen Medic started using Lead Center because they were losing leads due to missed calls, they saw immediate results.

SCREEN+MEDIC.
PORCHES • WINDOWS • DOORS

Over the past year they've been able to recapture leads from 1,500 missed calls. They even set up a system to automatically create a support ticket for each missed call.

Watch Screen Medic's story.



Communication issues cause small and misized companies to lose business

Lost or delayed customer communications cause businesses to miss out on revenue. Common communication issues include not answering calls, taking too long to return a call, or asking customers to repeat their requests.



Missed calls result in an average of **\$161,594** in missed revenue annually

Slow response times cause small and mid-sized businesses to lose out an average of **\$149,035** a year

Communication issues cause an estimated average of **\$142,846** in missed revenue annually

Missed revenue opportunities caused by communication problems are a sign that businesses need to improve their communication tools—and that the investment will be well worth it!



Why Small Businesses Aren't Investing in Better Communication Tools

Small businesses want solutions that solve their communication challenges, so what's holding them back?

Small businesses worry about investing money in new solutions, but better technology is increasingly necessary to run a profitable business. New technology investments must be cost-effective and provide high ROI. In addition to budget concerns, small businesses are concerned about trust, time, and knowledge.

95% of small and midsized business leaders agree that their business needs to improve...

...the tools they use to aid in customer communications like lead/contact/buyer response. But despite knowing they need better tools, many businesses say they are holding back on investing.

Small businesses face internal roadblocks to getting new communication tools:



93% of small businesses say budgetary restrictions have held them back from adding more technology

55% of small businesses say don't they have a trusted way to evaluate which tools they need

Small businesses also have concerns about the capabilities and suitability of the tools that are available.



78% of small businesses wish the tools they needed were more consolidated

74% of small businesses wish the tools they needed were aimed at smaller businesses rather than enterprise-level companies

62% of small businesses say they don't trust technology to keep sensitive client information private

63% of small businesses say the current tools on the market do not integrate well with their existing suite of tools/platforms

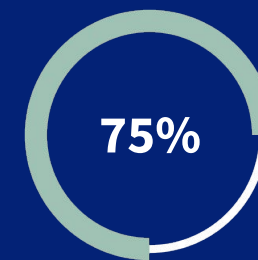
Businesses want better technologies and features

Still, most small businesses know that despite hesitations, they need to make a bigger investment in improving their communication tools. In fact, **84%** say their company has plans to add more technologies in the next year.

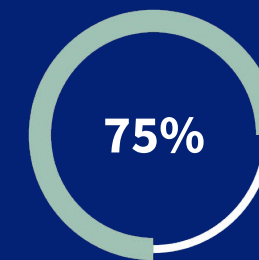
The investment that would benefit them most, according to **93%** of small businesses, is a collaborative/unified inbox which would enable them to better keep track of all their communications.

Other key benefits small businesses believe they would realize from investing in better communication technologies include:

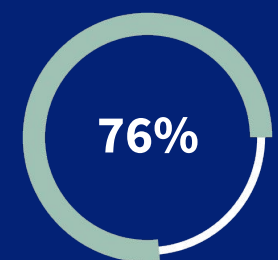
- **70%** say they would benefit from more information about what was discussed on previous calls
- **77%** say their company would benefit from more information about what was discussed in previous chats/messages
- **78%** say that customer relations would improve if they had the ability to answer and make calls from their business number via their cell phone
- **74%** say the volume of calls and/or messages they could respond to in a week would increase if they had the ability to answer and make calls from their business number via their cell phone
- **77%** say that the amount of work they could get done in a week would increase if they could answer and make calls from their business number via their cell phone



agree they would benefit from lead tracking technologies



agree they would benefit from call recording technology



agree they would benefit from call intelligence technology



Simplify and Centralize Solutions

Currently, **67%** of small and midsize businesses find their current suite of communication software difficult to understand. Often, this is because these communication tools are built for the enterprise—and not small businesses. The good news is that a unified solution built for smaller businesses that can track and store all prospect/customer communications across teams and departments can make “the dream work.” It can save time, increase revenue, and decrease frustration for team members and .

A solution like CallRail’s Lead Center is built just for small and midsize businesses. It will consolidate communications in a team-wide inbox and integrate with existing communication tools—giving your business just what it needs to communicate effectively and efficiently without adding complexity. A unified solution will help make the time-tested systems you’re already using work better for you and your customers. That’s how to improve teamwork to make the dream work.

Improve customer communication with a unified inbox

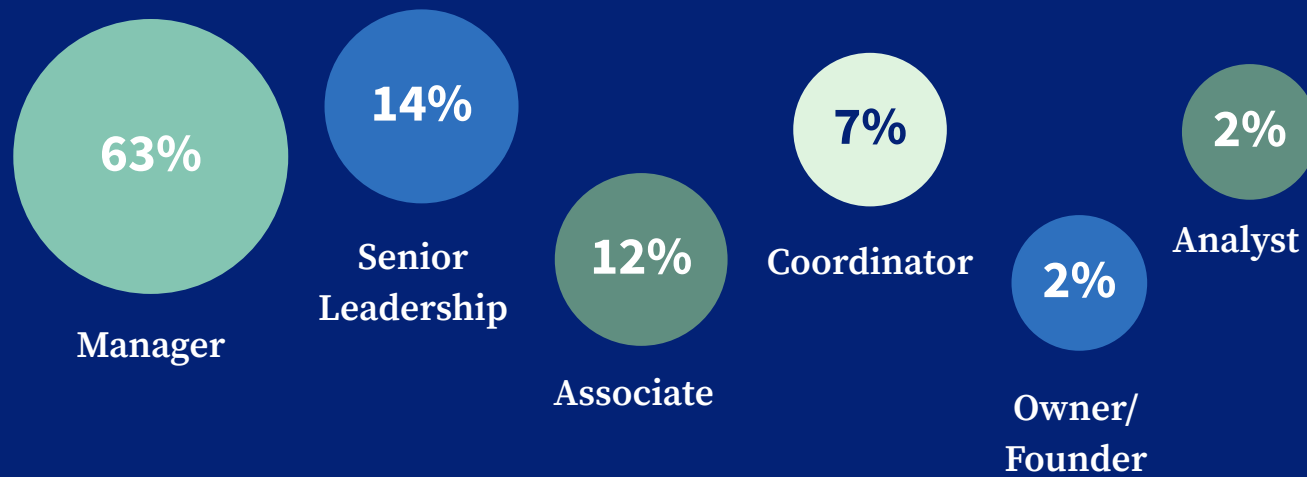
See how CallRail’s Lead Center can help your team manage customer conversations and capture more leads.

Try it today! [→](#)

Who We Surveyed

We surveyed 601 small and mid-sized leaders and employees living in the United States who said they or their teams regularly interact with customers.

- The average age of respondents was 36 years old
- Respondents were **57%** male and **43%** female
- All respondents are employed full-time
- Most of the respondents were in management or leadership positions:

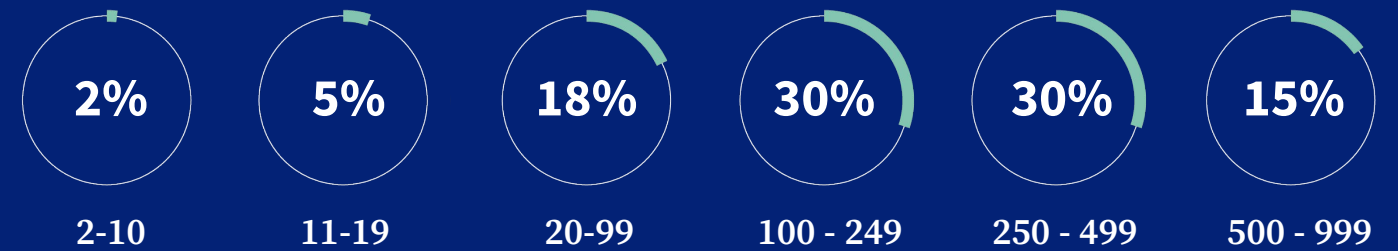


Industries surveyed

- Legal Services, Home Services, Financial Services, Healthcare, Automotive, Real Estate or Real Estate Investment industries.

About the Business

Number of Employees



Annual Revenue

