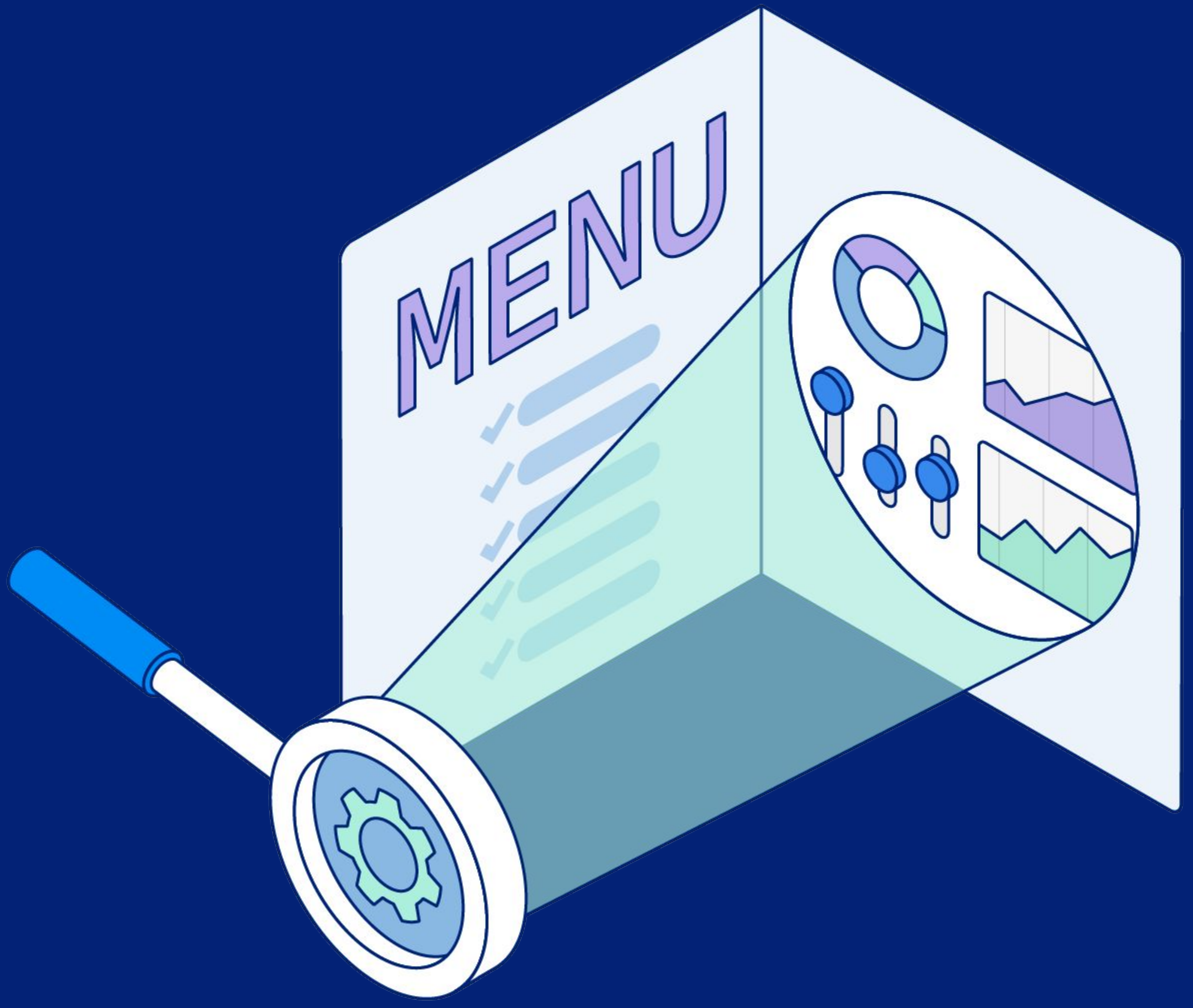
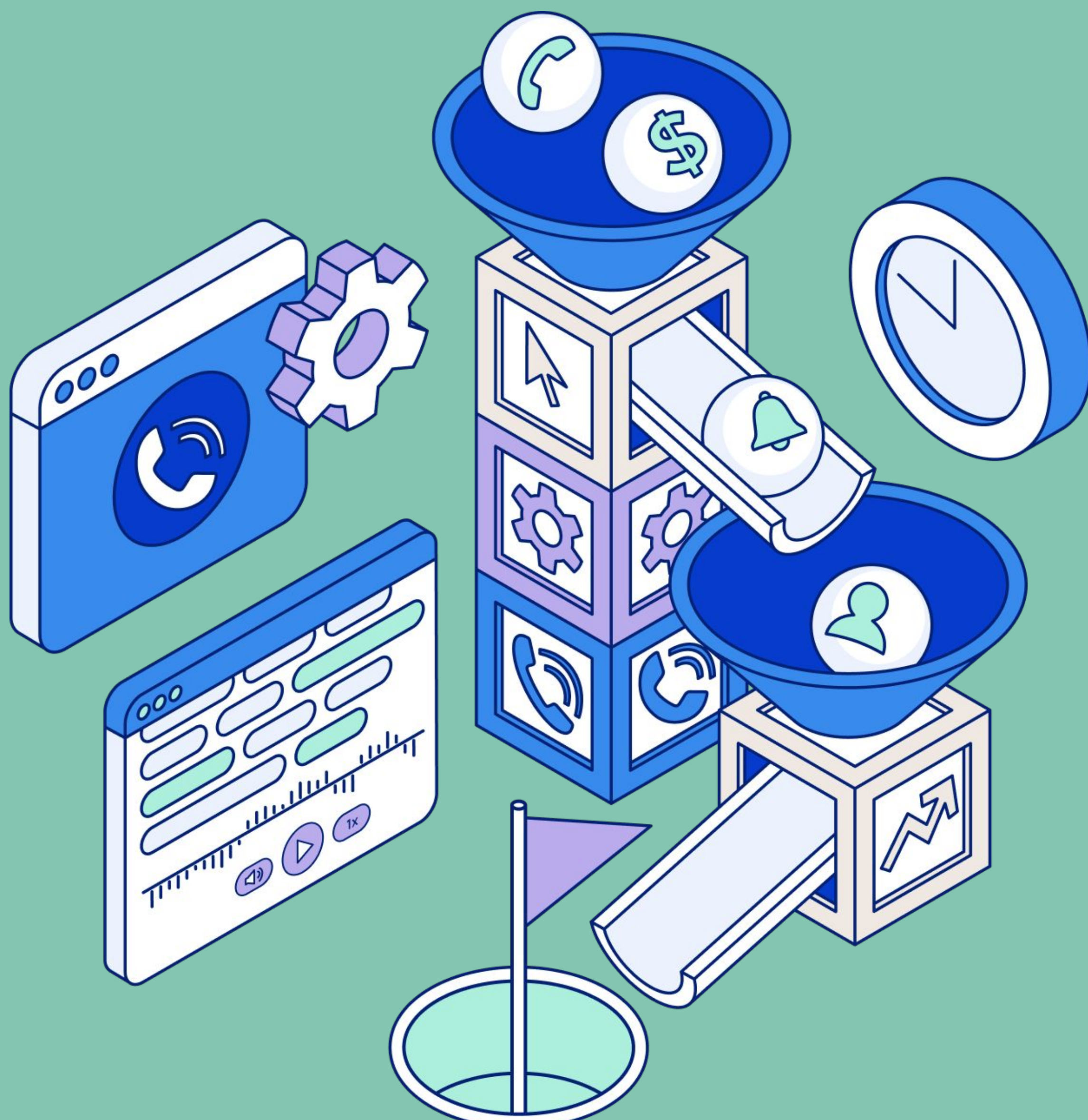
CallRail

CallRail's Secret Menu 2023

Features you didn't know you were missing out on





Maximize your use of CallRail

Chances are you're already tracking all your phone calls with CallRail. You're meticulously creating new Call Tracking numbers, assigning them to new campaigns, and getting a clearer picture of your marketing performance and the people on the other end of the phone.

You're also likely recording your calls while reviewing call transcripts to suss out new marketing opportunities, improve your service, and train your staff effectively. And if you're using our qualified leads feature, it's safe to say that you've seen an improvement in leads generated.

But what if you could do more? What if you could uncover additional savings and opportunities to drive revenue and ROI? Would you pass it up or dig deeper? The good news is that you don't have to look far. We've collected all the hidden features that make up our secret menu that can help you better communicate, analyze, and organize your leads.

Give them a try. Let your friends and coworkers know. And if you have questions, don't hesitate to reach out.

Section 1

Call Tracking Optimization

Website Visitor Tracking *(requires: Call Tracking)*

If you're like most of our customers who track calls from their website, when you started using Call Tracking, you set up single source tracking, which involves putting a single CallRail number on your site in place of your main business number. This lets you know who called directly from your website at that moment.

This is a great start, but there's a second type of tracking – website visitor tracking – which gives you visibility into the full customer journey, including the specific ads, campaigns, or search terms that drive leads to your website and prompt them to call. This allows you to match calls and keyword bids so you know how your Google Ads are helping with conversion. You can then better optimize landing pages to drive higher volume and quality leads, as well as refine your paid digital marketing strategy by tracking calls back to search terms.

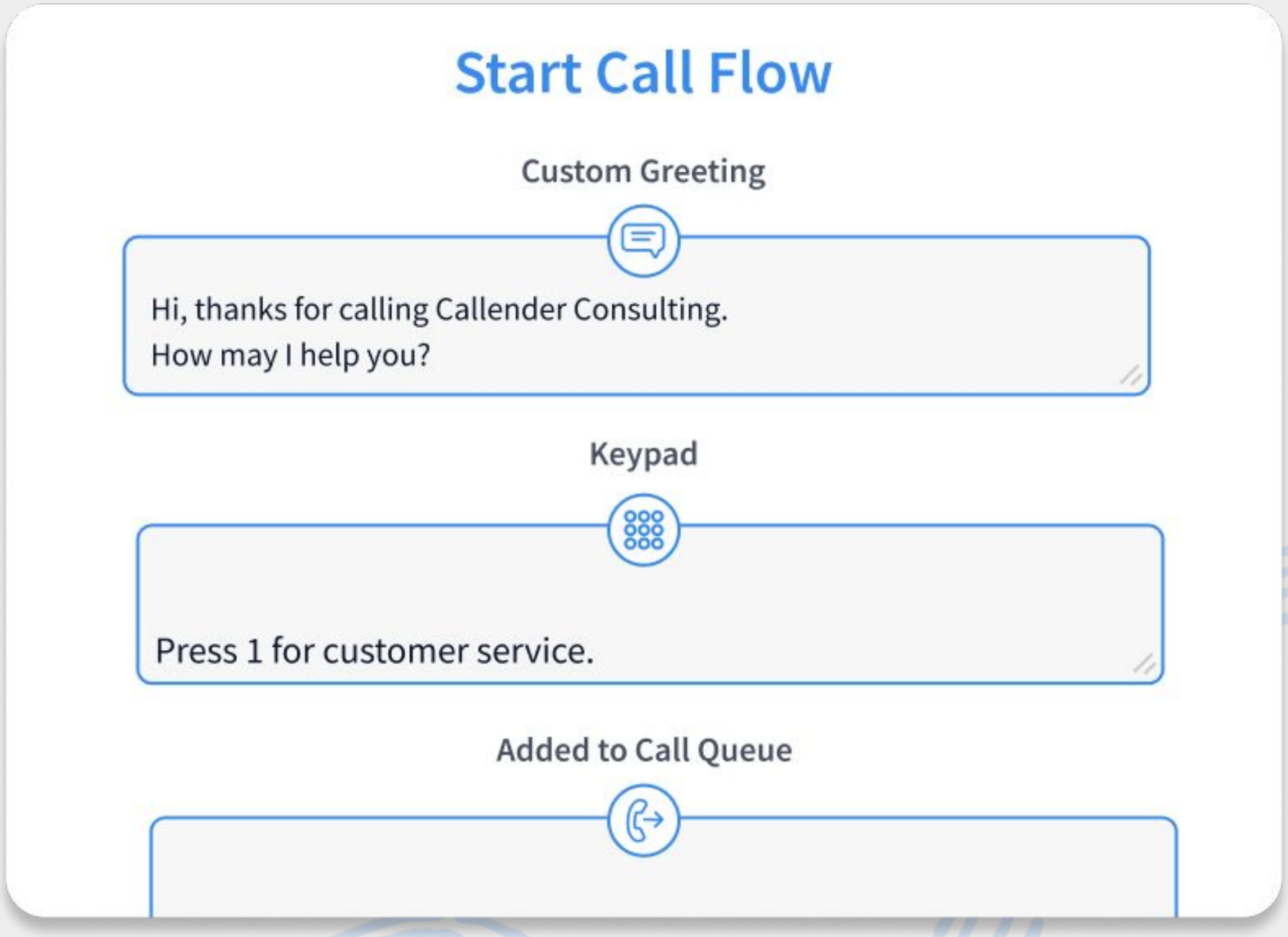
Dive into how to set up website visitor tracking here.

Call Flows *(requires: Call Tracking)*

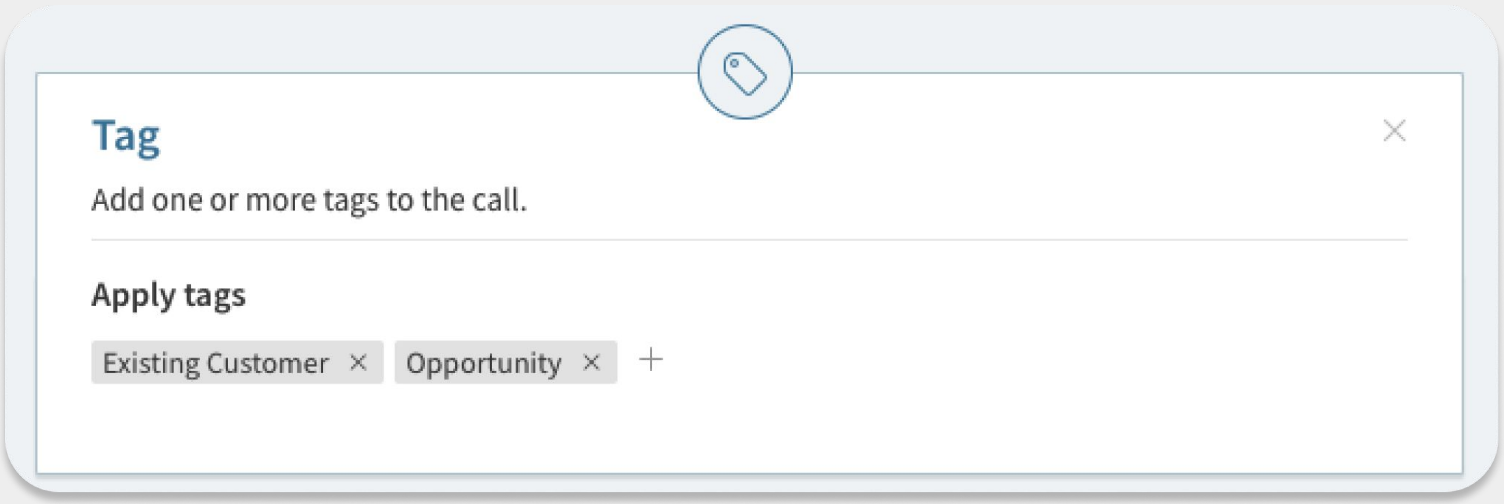
Part of ensuring that you're delivering an exceptional customer experience is making it easier for callers to find what they're looking for and connecting them with the right person. Call Tracking's call flow feature gives you the power to create a routing system that takes care of callers from the moment they connect to your tracking number. Using our call flow builder tool in Conversation Intelligence, you can easily build a call flow from scratch and assign it to your call tracking numbers of choice as well as record custom greetings that tell callers how to navigate your call flow.

There are also several templates you can use under call flows to create a routing system specific to your needs. For example, the menu step template allows callers to press a number on the keypad to be routed to a specific person, department, or team. The round robin template lets you route phone calls to multiple destinations in a queue sequentially. And the scheduling template allows you to route calls based on department needs, agent capacity, or business hours.

Explore all the templates in this article.



Call Flows Tag Step *(requires: Call Tracking)*



Set up automatic tagging based on how your customers interact with your call flow to unlock insights before you even pick up the phone! Then you can view the Calls by Tag report to understand what your customers are looking for when they call you, how they want to communicate with you, and more. Use your findings to further tweak your call flow to better serve your customers and leads!

Learn how to set up a tag step in your call flow here.

Lead Qualification *(requires: Call Tracking)*

Lead qualification is what gives color and context to your daily interactions. It's the next step in being able to make more informed decisions about how you conduct business.

- **Qualified:** Keep it simple: give it a thumbs-up!
- **Tags:** Get more specific by tagging the call based on what's important to your business.
- **Value:** Have a good idea of the lead value after getting off the phone? Add the value and instantly gain insight into your pipeline.
- **Notes**: Get super detailed by keeping notes from the call. This is especially helpful when fielding a high volume of calls, or if you have multiple employees working with the caller. Having a detailed log of past interactions gives your customer experience that "wow" factor!

Bonus: *You can also qualify, tag, or add value before you even hang up the phone by pressing the star * key.*

Become an expert at qualifying leads in CallRail.

Section 2

Call Insights

Call Highlights *(requires: Conversation Intelligence)*

By now you know how valuable it is to track your inbound calls. But what about the insights contained in those conversations? If you can tap into the information relayed in those calls, you can fine-tune your messaging and marketing to better resonate with your target audience.

The call highlights feature available in your Conversation Intelligence Plan allows you to unlock those insights and more. Call highlights works by recording your inbound calls and then uses artificial intelligence (AI) to surface commonly asked questions and phrases.

In turn, you can use that data to inform your keyword bidding strategy, optimize the copy on your website, and generate helpful content that speaks to your target audience. Call highlights also identifies keywords you've specified to mark a qualified lead and gives you a better sense of how to update your lead scoring so you can focus on the leads that matter.

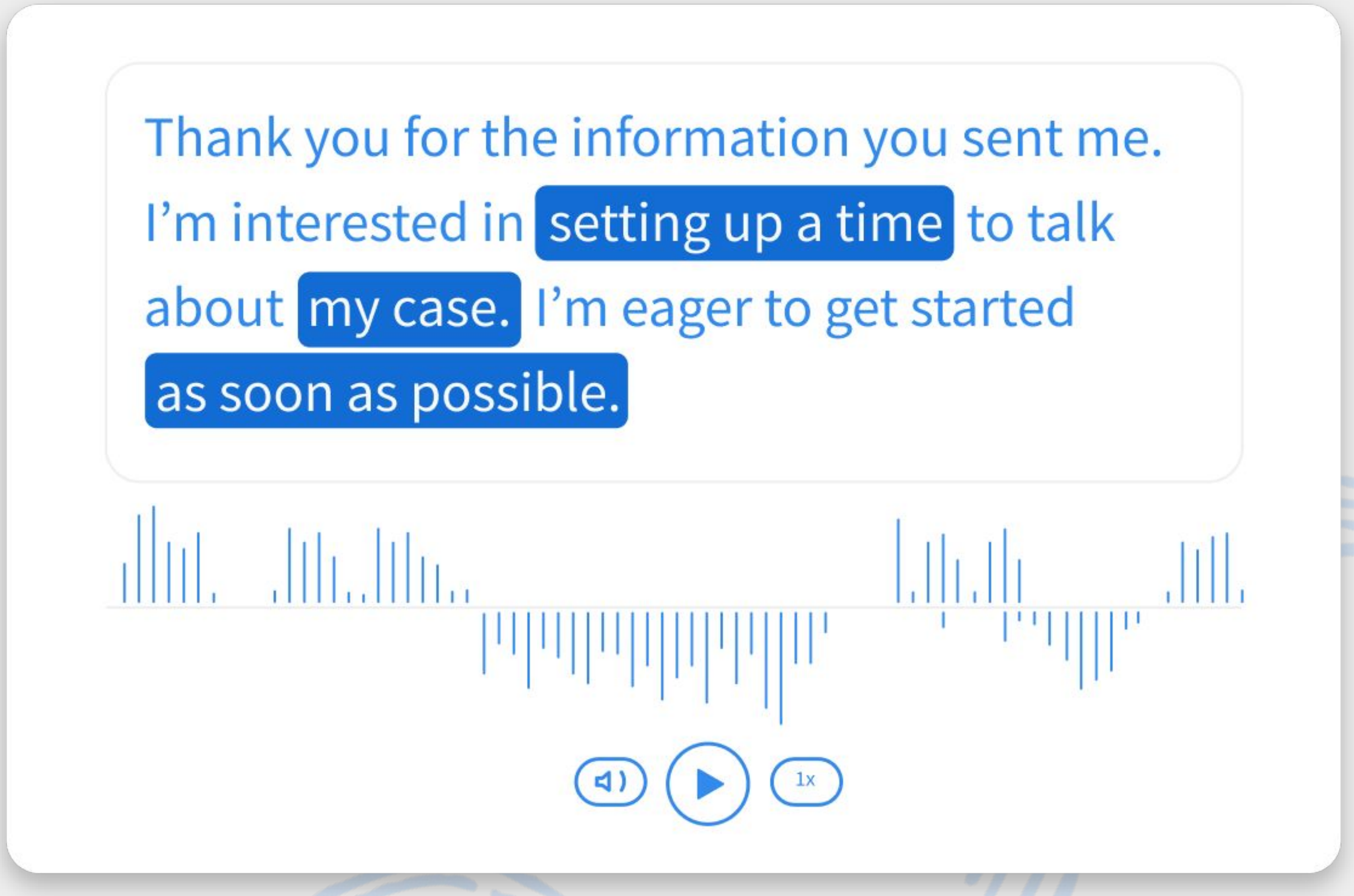
Explore the possibilities of call highlights in this report.

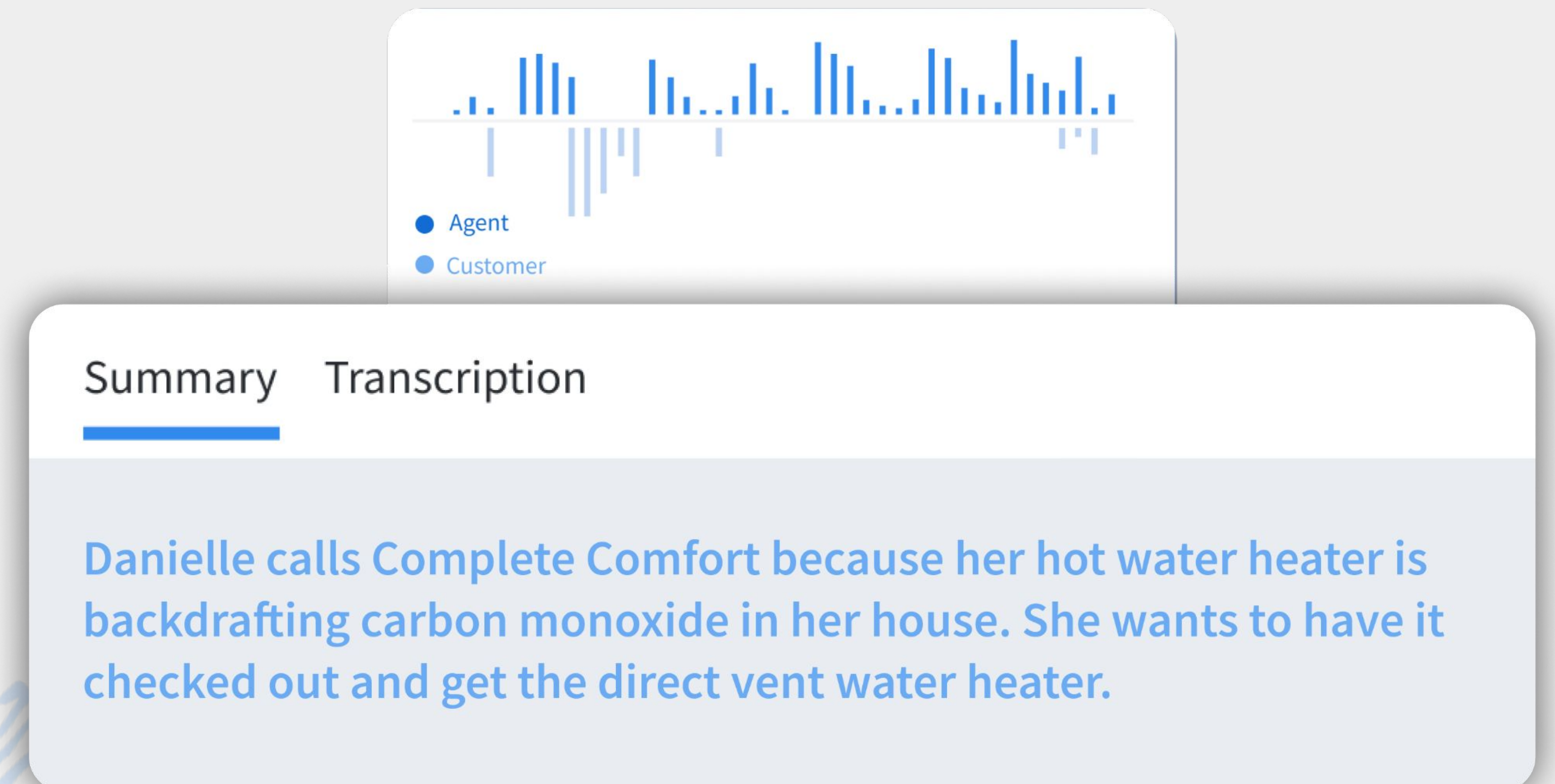
Key Terms Spotted *(requires: Conversation Intelligence)*

Call highlights pinpoints the words and key phrases your target audience uses when talking about your business. Once you have determined which ones are the most important, you can use the key terms spotted feature to keep track of them.

Housed within Conversation Intelligence, key terms spotted cues you in on how often these words come up in conversations and when. This feature is extremely beneficial for making sure your agents are following a specific call script or if you want to know how many calls are coming in that are sales related versus service-related.

Follow these steps to turn this feature on.





Call Summaries

(requires: Premium Conversation Intelligence)

In the past, you may have accepted that you simply couldn't listen to every call and would miss some valuable insights. Today, that's no longer the case. CallRail's Conversation Intelligence uses artificial intelligence (AI) to review and analyze all your calls for you to deliver key highlights of calls.

Call summaries lets you review call transcripts at a glance by creating a three to five sentence summary of every call – making it easy to find whether talk tracks are being followed and identify areas where product training may be needed. Call summaries also reduces friction when engaging in multiple conversations with customers and speeds time-to-close thanks to more thorough context for handoffs.

Finally, call summaries allows you to quickly identify emerging trends because it analyzes and summarizes insights across numerous calls – all while saving your team significant time and effort reviewing every call.

Discover how you can conveniently view all your call summaries.

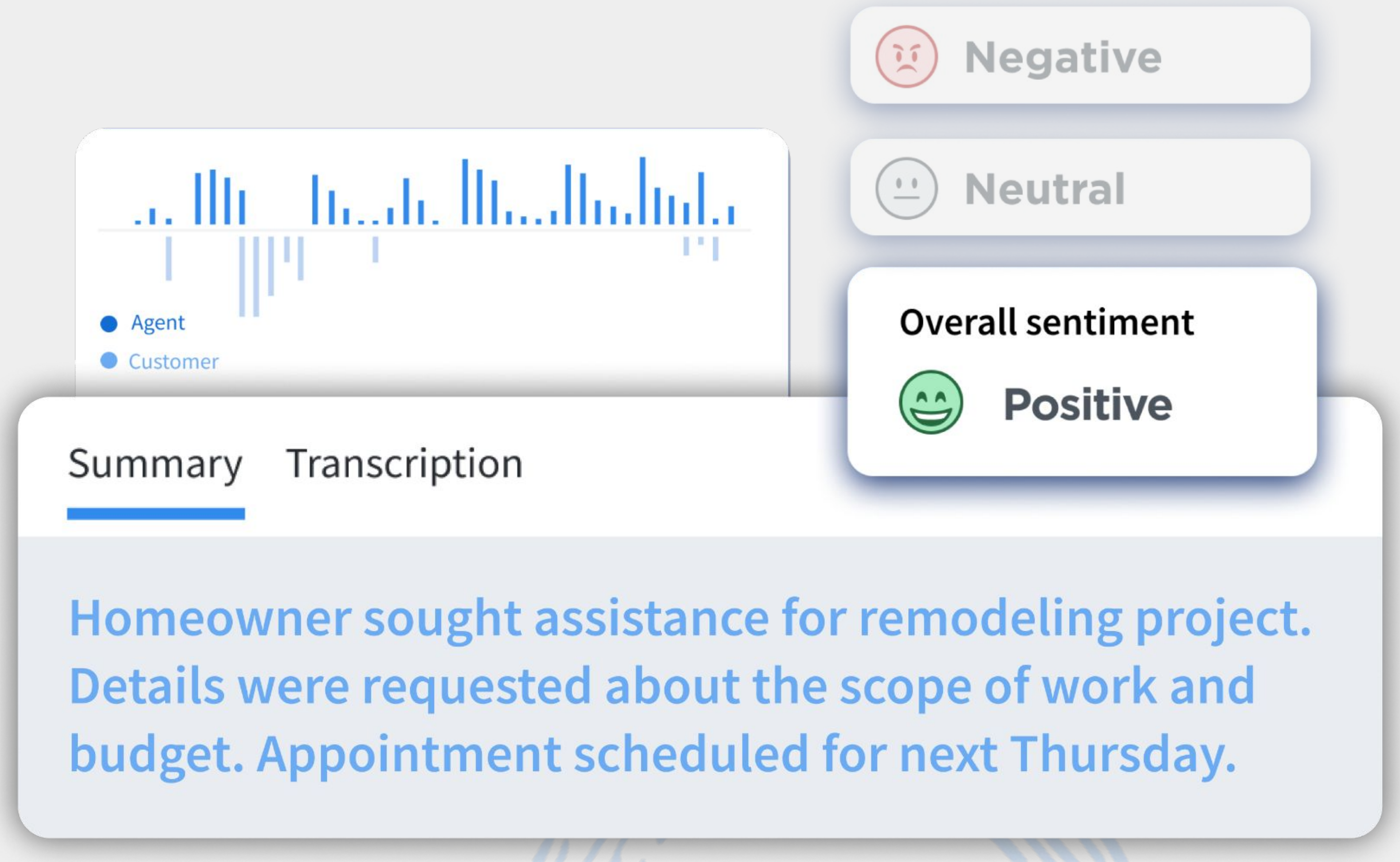
Call Sentiment Analysis

(requires: Premium Conversation Intelligence)

Monitoring customer and staff sentiment on your calls helps you understand what frontline teams say on calls and how that impacts customer satisfaction. It also allows you to identify where staff may need additional support or training and helps ensure quality experiences for your customers, which strengthens customer loyalty, drives positive word-of-mouth, and ultimately contributes to the long-term success and growth of the business.

With call sentiment you can identify customer sentiment in real-time. This enables you to quickly identify customer frustration and escalate calls to a manager. It also lets you monitor and measure the sentiment of calls so you can quickly understand what your frontline teams are saying on calls without spending time listening to call recordings. This helps team leads ensure their teams are providing good experiences.

Learn more about call sentiments in this article.



Section 3

Communication

Automated Responses *(requires: Call Tracking and Form Tracking)*

Missed calls from prospective leads don't have to mean missed opportunities. Available directly within Call Tracking, automated responses allow you to send a text message to someone whose call you missed, allowing you to stay top of mind with leads and customers.

But what about missed form submissions? The same functionality exists if you're using Form Tracking to keep track of forms built-in CallRail or your form builder of choice. As soon as a customer or prospective lead hits submit on your website, an automated text message will be waiting for them on their phones.

Learn how to turn Automated Responses on here.

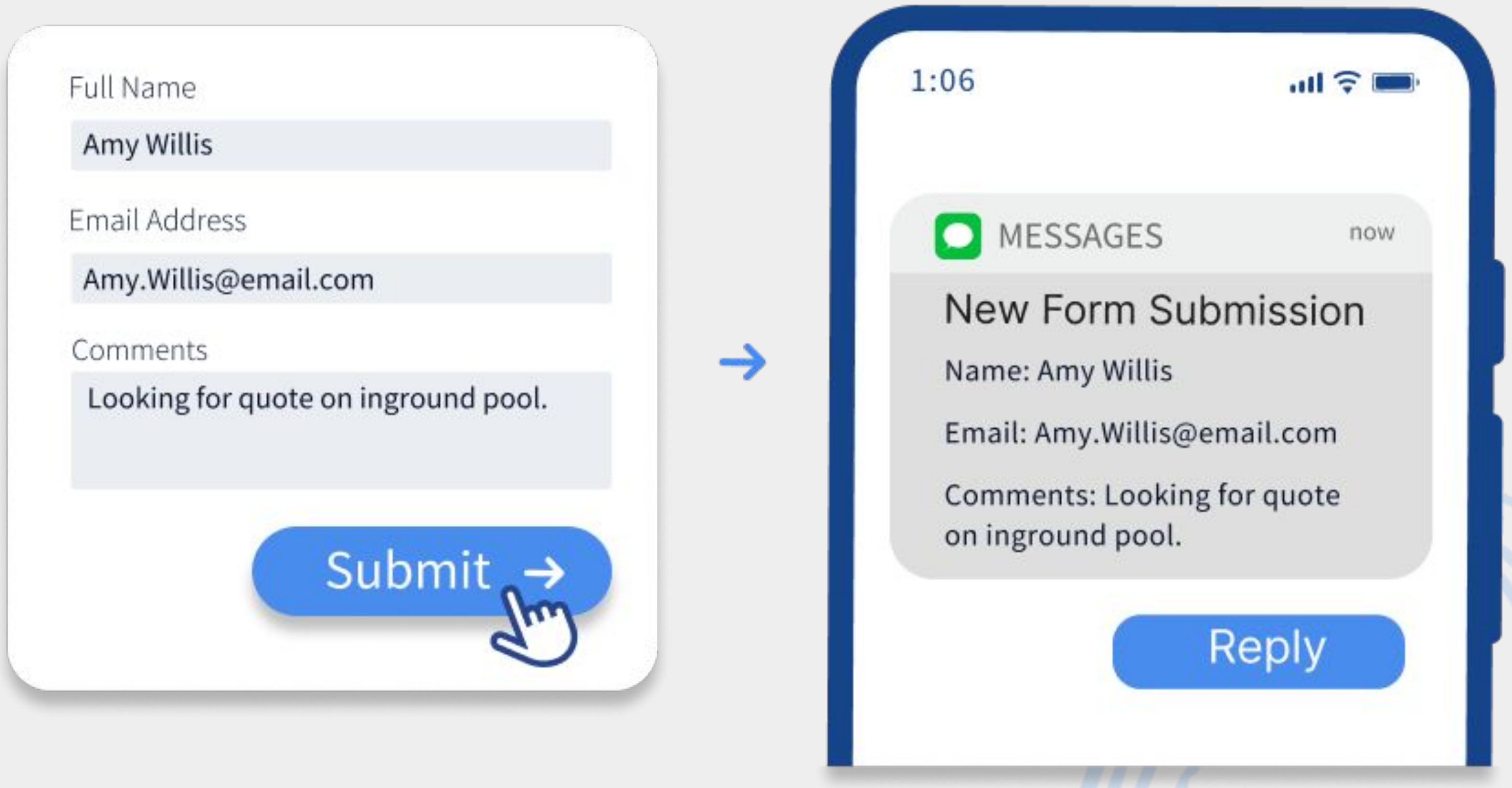
Form Quick Responses *(requires: Form Tracking)*

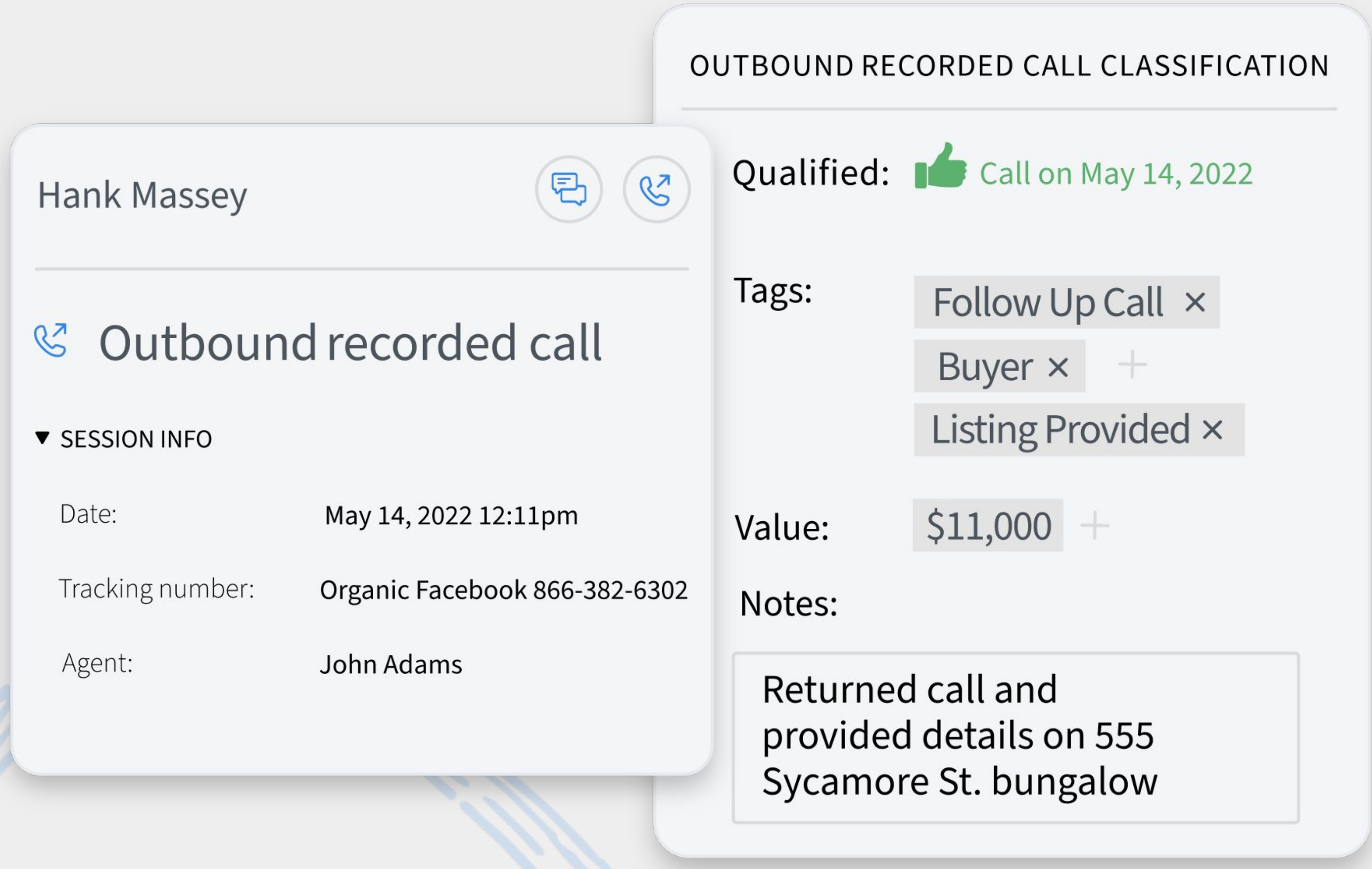
Response time is everything. Any lag between the first contact and your response increases the likelihood that your prized lead will go with the competition instead. Form quick responses helps you close the lag by alerting you when a form has been submitted.

Depending on how you want to be notified, the system will send you a text, email, or phone call when a form is submitted. It then gives you the option to connect with the customer or prospective lead directly from the notification.

So, if Amy submits a form on your website, you'll get a text letting you know, along with the details she shared. You can then reach out to her from your smartphone within minutes of the form being submitted. Talk about never missing another lead. All you need is Form Tracking to make use of this feature.

Read more about it in this article.





Outbound Calling *(requires: Lead Center)*

You can use Lead Center as your complete business phone system, either alongside your current solution or in place of it, to consolidate tools. Lead Center works just like your phone and even better. Make and take calls, transfer them between staff, queue callers when your team is tied up, monitor live calls, and much more in Lead Center.

With the smart caller ID feature, you can return all inbound calls in one click and automatically use the same call tracking number they used to get in touch. Lead Center also automatically manages all customer interactions — providing you with an all-encompassing customer communications portal, including a detailed timeline of your communications to date. And with the ability for your team to use the Lead Center mobile app, you'll dramatically free up more employee time and flexibility.

By making outbound calls in Lead Center using your call tracking numbers, you'll increase your answer rate, convert more customers, reduce the length of your sales cycle, and make your staff's lives easier.

Get more details of the benefits of Lead Center here.

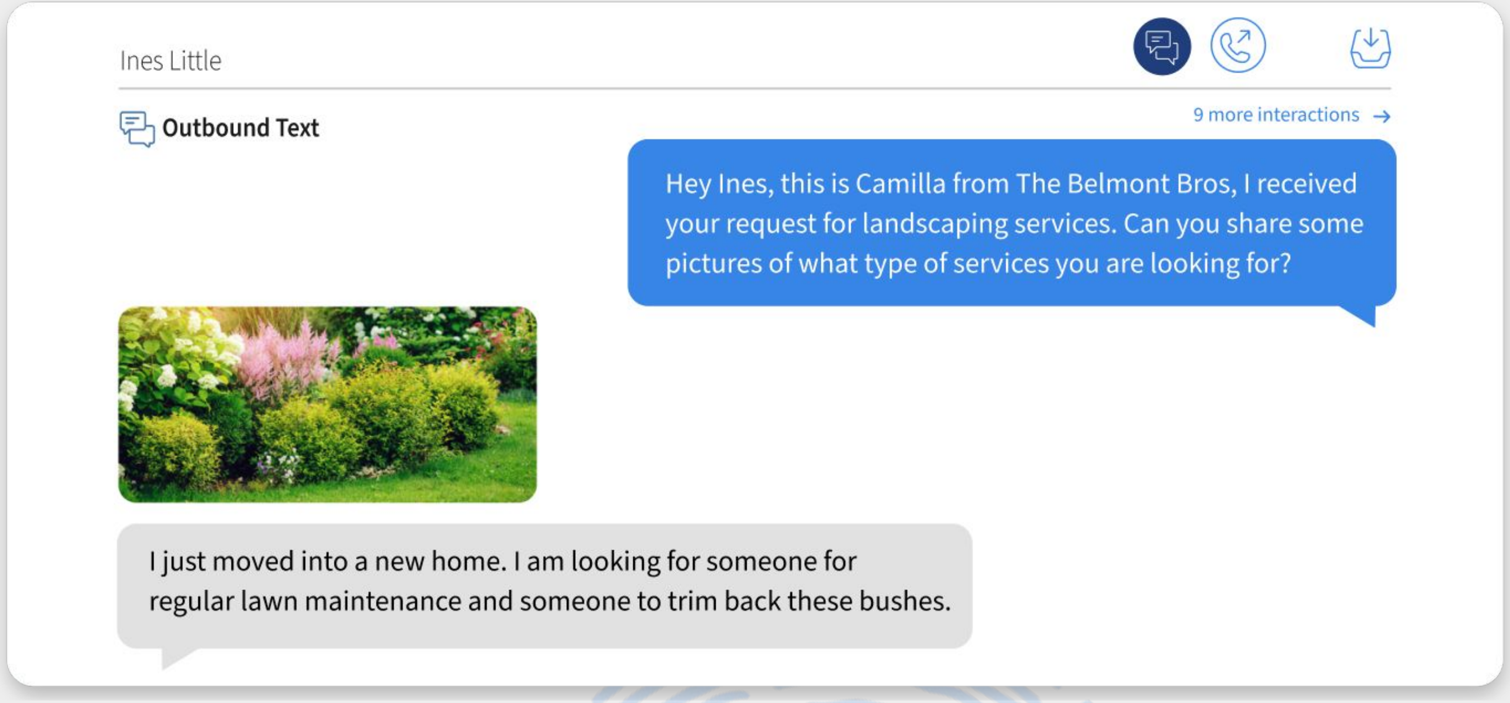
Unlimited SMS & MMS Texting *(requires: Lead Center)*

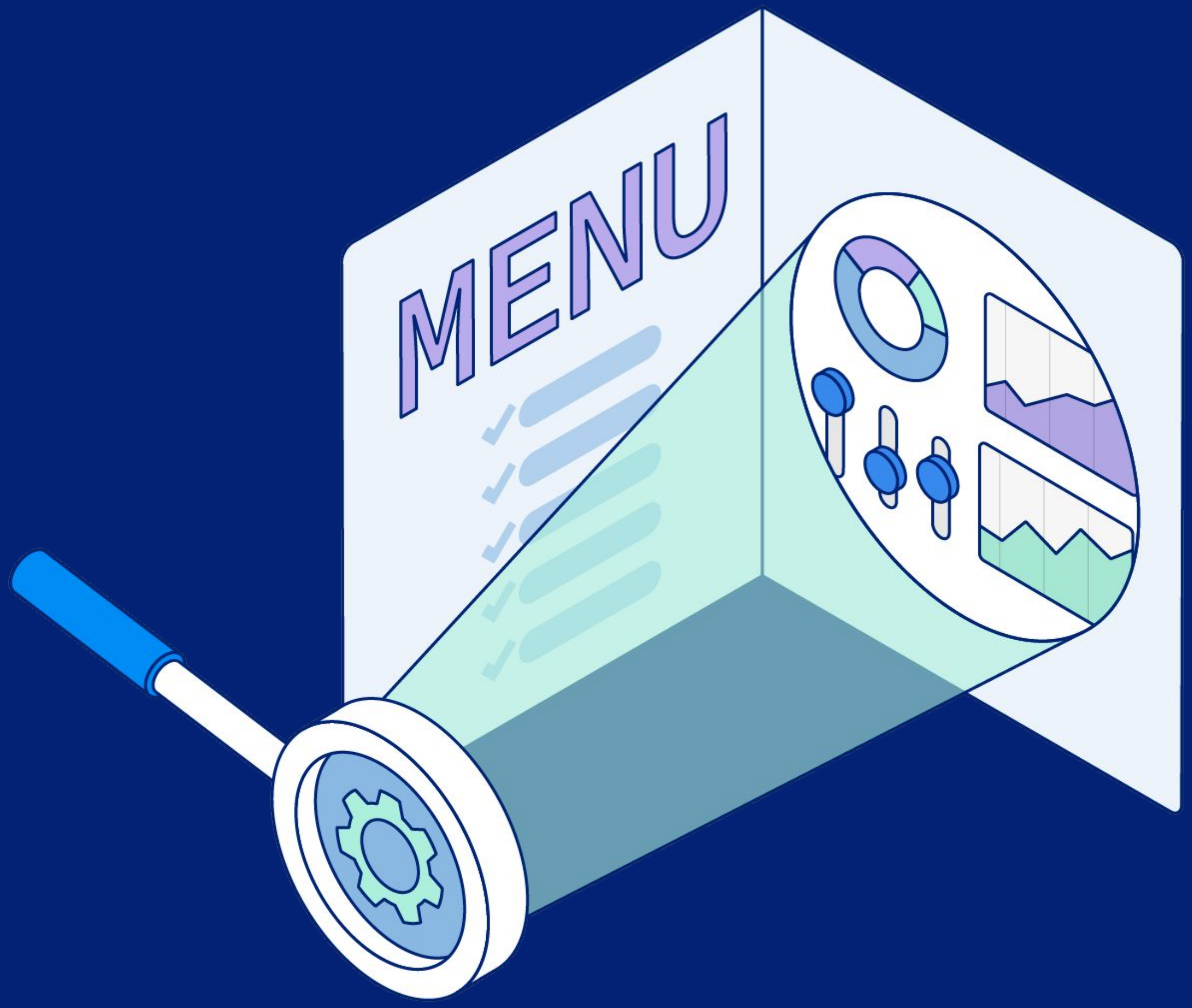
Not only do [89% of consumers] prefer to communicate with businesses through texting, 74% respond to a text from a business within an hour. Plus, texting saves time and is more efficient for everyone. It's a lot easier for your business to handle multiple text conversations at once than it is multiple phone calls.

With Lead Center, your team can send, receive, and manage texts alongside your other communication channels without leaving the CallRail app. You can send texts without character limitations, customize text templates, fire off templated texts in just a few taps, and send photos and videos in the office or on the go.

You also don't have to worry about dropping the ball. Lead Center provides a centralized, foolproof log of your team's communication history with each individual prospect or client. Anyone on your team can quickly dig into when the customer got in touch — and whether or not someone on your team responded — so you'll never accidentally leave a customer hanging again.

Here are even more tips for texting as a team.





CallRail

Getting Started

CallRail's secret menu helps you get the most out of the platform with features that allow you to better communicate, analyze, and organize your leads. Regardless of your plan, everyone gets call flows, automated response, and lead attribution by source. All you have to do to leverage these tools' power is turn them on.

To experience the rest of the features in our secret menu, connect with a CallRail expert to set them up right away. Or feel free to email analytics@callrail.com.

Connect with a CallRail expert