

CallRail

Case Study

**How this HubSpot  
Solutions Partner  
solves the attribution  
puzzle with the CallRail  
+ HubSpot integration**



# “The CallRail + HubSpot integration helps us prove our value to clients.”

Neon Goldfish is a boutique marketing agency founded in 2007 by long-time friends Ken Franzen and Justin Johnson, with offices in Holland, Ohio and Orlando, Florida. According to Susie Ybarra, Account Manager, the agency caters primarily to small businesses with urgent marketing challenges and website needs.

To attract clients, Neon Goldfish capitalizes on an area where others often fall short: responsiveness. "Many times, clients will work with a developer on their website or PPC specialist on their campaigns, but won't be able to get in touch if something goes wrong after the fact. We fill those gaps for small businesses."

Through this approach, Neon Goldfish can solve a new client's urgent need, while (ideally) warming them up for more. "We start with a short sprint to get your site or campaign on track and if you like us, you can stay for another one," Susie told us. "Instead of forcing a client that's never worked with us to sign a retainer, we let them get acquainted with our work."

That's how Neon Goldfish brings new clients in — but to keep them as long-term customers, they need to help clients see the value their marketing efforts are driving. So how do they do that?

In Susie's own words: "The CallRail + HubSpot integration helps us prove our value to clients by generating more of the right leads, cutting wasted marketing spend, and even reducing call spam."



*“The CallRail + HubSpot integration helps us prove our value to clients by generating more of the right leads, cutting wasted marketing spend, and even reducing call spam.”*

Susie Ybarra, Account Manager, Neon Goldfish



## “CallRail is a natural fit for HubSpot.”

When Susie Ybarra joined Neon Goldfish in 2017, she started by evaluating the agency’s tech stack. With HubSpot in place as the CRM, Susie zeroed in on the missing piece of the puzzle: call attribution. Susie headed to the HubSpot App Marketplace to scope out a solution and came across [CallRail’s listing](#). Swayed by positive reviews, she started a trial.

After Susie started setting clients up on CallRail and using the integration for a short time she realized, “CallRail is a natural fit for HubSpot.”

At first, Susie described how she was captivated by the convenience the integration provided. “It automatically creates a new contact for the lead with the call recording — all inside HubSpot. The client also gets notified when a new contact is created. You can create notes and identifying information if they’re already a current customer. This fills a huge gap in our sales process!”

Susie found that the more she worked with the integration, the more insights it revealed. “Sometimes CallRail even provides data that HubSpot misses. There are times when HubSpot doesn't pick up keywords, but CallRail will — so I can see the ad that a lead clicked on through HubSpot, and CallRail will give me the keyword that was the catalyst for the call.”



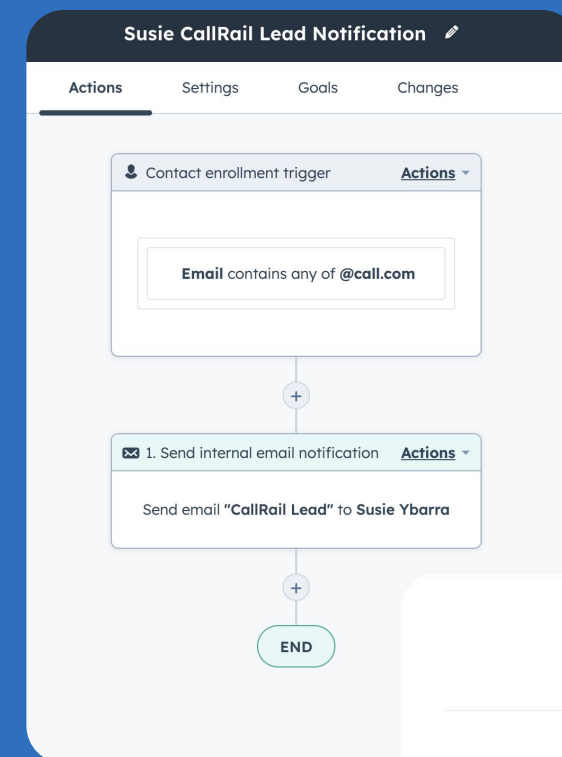
# Use the CallRail + HubSpot integration to generate more of the *right* leads

Neon Goldfish’s goal is always to bring in as many qualified leads as possible – and Susie clued us in to how the CallRail + HubSpot integration helps her do just that. “I listen to most of the calls that come in through CallRail numbers. From the first minute, it’s clear whether it’s a lead worth pursuing,” she explained. This helps her assess whether the campaign is attracting the right audience or if adjustments are needed.

And the practice has paid off for Neon Goldfish: “We recently ran a campaign for ourselves around ‘broken website repair.’ We quickly found that it was pulling in unrelated calls for ‘appliance repair’ and ‘boat repair,’ even though we had set negative keywords.”

Ahead of the curve, Susie leveraged a secret weapon – an automated workflow available through the CallRail + HubSpot integration. She customized the workflow so that as soon as a call came in, it would trigger an email to her with the CallRail recording that plays directly in HubSpot.

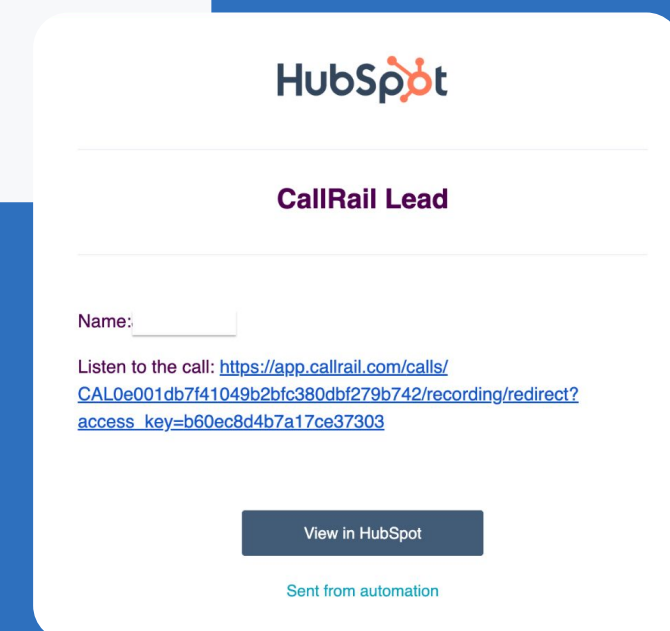
Susie went on to explain how because of the automation, they were able to act fast. “We promptly identified the issue and added more negative keywords, to avoid wasting time and money on leads coming from irrelevant search terms.” The integration, she continued, “is a cost-savings and quality assurance measure that helps us target the right audience.”



## Workflow automation:

Trigger automated workflows based on call and text activity or marketing source.

Capture call recordings in each contact record to easily evaluate sales messaging and coaching opportunities.



# Identify threats to your marketing ROI through call tracking and recording

“In the past, several of my clients would just hand money over to the person who was managing their ads,” Susie lamented, “but without reporting, they didn't know what was happening with their marketing dollars.”

Neon Goldfish stands out among agencies as they are able to offer full transparency thanks to the CallRail + HubSpot integration.

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- Susie Ybarra, Account Manager, Neon Goldfish



## Ensure team members are making the most of each call

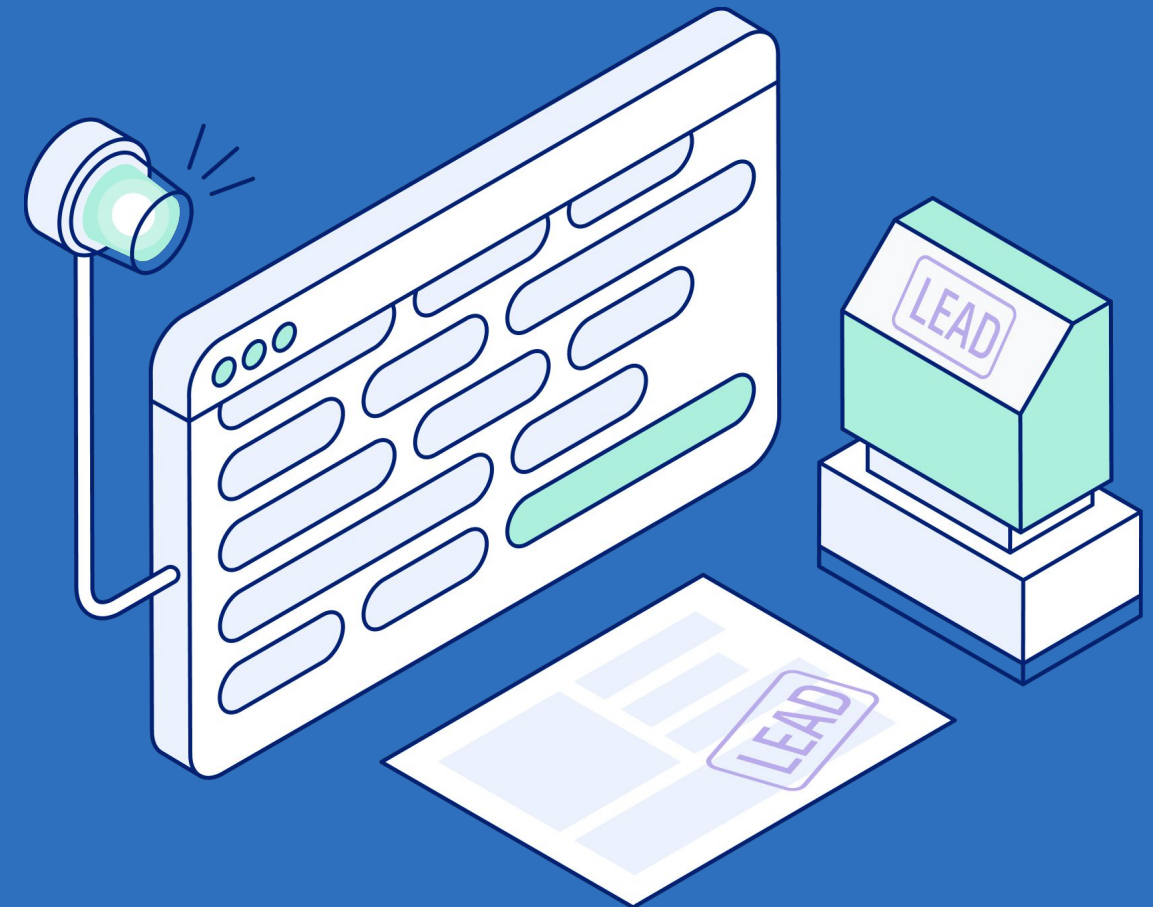
For marketing agencies working hard to generate qualified leads for their clients – every single one is precious. To hold clients accountable for converting the leads the agency drives, Neon Goldfish relies on the CallRail + HubSpot integration to ensure team members are making the most of each call.

“One of our clients, a law firm, had opened a new satellite office and we were running ads for it,” Susie detailed. “As qualified leads funneled in through the main office, the receptionist would tell the lead that they were out of their service range – because she wasn’t aware of the firm’s new location.” Thanks to CallRail, Susie was able to alert the firm so they could inform their staff and update their intake process.

## Keep track of every lead

When you're generating lots of leads, some can inevitably get lost in the shuffle – unless you have a fail-safe. Thankfully for one of Susie's clients in the manufacturing industry – they did! Susie's client was using an automated answering machine where callers would select a prompt to connect to the right representative.

Apparently, the person responsible for a key pre-sales inbox left the organization, but nobody updated the voicemail tree. As qualified leads clicked on the PPC ads, called the business, and selected the prompt to speak with this individual – they ended up in an unattended voice mailbox. “We only knew this was happening because of CallRail,” said Susie. With insights from the integration, Susie was able to alert the client of the phantom inbox and follow up with the once-lost leads.

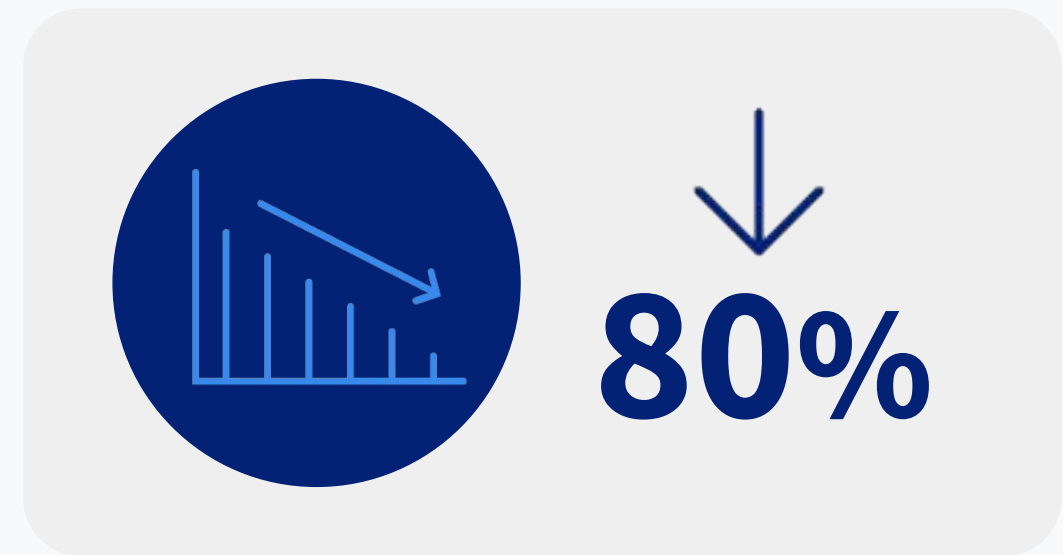


## Ditch spam calls and regain your time

While CallRail was already helping to generate qualified leads and reveal process blockers, Neon Goldfish was pleasantly surprised by another unforeseen benefit — a significant reduction in spam calls.

“My client was getting at least six spam phone calls per day where the phone would ring and nobody would be on the line. Through CallRail, I was able to mark the offending area codes as spam to block them and now, spam calls have gone down by about 80 percent!”

With one simple tweak, Neon Goldfish helped their client redirect team members’ attention away from fielding spam calls, back to mission-critical tasks – thus improving their overall marketing ROI.



**“Spam calls have gone down by about 80 percent!”**

Susie Ybarra, Account Manager, Neon Goldfish

## Validate your strategies

Marketing agencies need to be able to prove their value to clients. So when Neon Goldfish's law firm client approached them with an attribution quandary, they looked to the CallRail + HubSpot integration for insight.

“Our law firm client relies heavily on referrals from other firms, where they'll pay a fee to the referring firm — as a thank you for sending the business to them.

“Recently, we had an instance where the prospective client mentioned they were referred by another lawyer. But through the CallRail + HubSpot integration, we saw that this person first Googled “injury lawyer”, before clicking on our PPC ad, and finally called the firm using a CallRail call tracking number.”

When a potential client hears about a law firm, service or product, they might remember the essence — but not the name of the business. Neon Goldfish's efforts in local search rankings allowed their client to appear at the top of the search results for “injury lawyer,” so luckily they did not lose the referral opportunity.



*“Like two pieces of a multi-attribution puzzle, HubSpot revealed the ad-click data, and CallRail the keyword searched along with the call tracking number — for a clear picture of lead attribution.”*

“If the client says that another lawyer referred them – that's valid. However, the prospect still made the unbranded Google search and was directed to the law firm through that channel. The data available through the CallRail + HubSpot integration validates that our strategies played a key role in this client's journey.”

Like two pieces of a multi-attribution puzzle, HubSpot revealed the ad-click data, and CallRail the keyword searched along with the call tracking number — for a clear picture of lead attribution.



A graphic showing two interlocking puzzle pieces. The top piece is blue and contains the text 'CallRail'. The bottom piece is white and contains the HubSpot logo. The background is dark blue with some faint white lines and a dashed white line in the bottom right corner.

CallRail

HubSpot

## Complete your attribution puzzle with the CallRail + HubSpot integration

Find out why over 3,000+ businesses use the CallRail + HubSpot integration to generate more of the right leads, reduce wasted marketing spend, and validate their strategies.

[Try the CallRail + HubSpot integration free today.](#)