CallRail

CallRail's AI FEATURE MENU

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INTRODUCTION

Running a small or medium-sized business brings unique challenges, from handling customer inquiries to managing leads, often leaving businesses stretched thin with tasks that could be streamlined. CallRail simplifies operations, allowing more focus on what truly matters.

So, take a seat, dig into this guide, and explore the menu of opportunities your business can achieve. Whether you're manually transcribing calls, dealing with lead follow-up, or aiming for better customer interactions, CallRail's AI features offer an easy way to save time, boost efficiency, and enhance customer experience.

Reduce Time MANUALLY LISTENING TO CALLS EACH WEEK

Imagine serving up more hours in your day by no longer needing to manually listen to and review calls. With CallRail's AI-powered **transcriptions** and **call summaries** automatically capture the most important details of every conversation.

Instead of sifting through countless hours of calls, you'll have:

- Concise summaries and key details delivered ready to consume
- Faster access to the insights you need to gauge lead quality
- Visibility into customer needs and team performance

— all without sacrificing your valuable time. Focus on higher-value tasks while CallRail's AI takes care of the heavy lifting.

Real Talk

“We get a few thousand calls a month, and I have to go through all of them to make sure our answering center and intake team are receiving leads properly, but also to take metrics on where people are finding us. The AI **call summaries** feature has been absolutely essential to me as it lets me speed through all our calls each week when I do my audit.”

— Kelsi Hardin, Legal Industry

KEEP YOUR FOLLOW-UPS HOT-N-TIMELY

Don’t let valuable leads go cold! With CallRail’s **smart follow-up**, you can ensure that a perfectly timed and personalized response follows every customer interaction. This AI-powered feature whips up ready-to-send emails or text messages after each call, based on the conversation, ensuring you never miss an opportunity to reconnect.

No more scrambling to review notes or sift through transcriptions. Smart follow-up serves up clear, actionable messaging, helping you stay prompt and professional while saving time in your follow-up process.

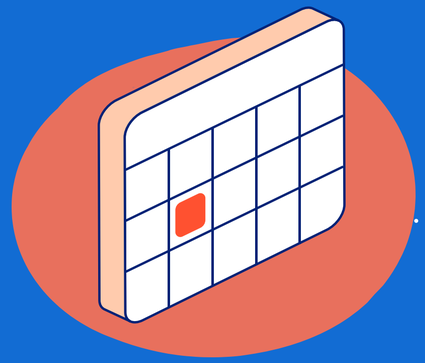
Elevate CALL PERFORMANCE AND CUSTOMER EXPERIENCE

Ensure every customer interaction is top-notch with CallRail’s **call coaching.** This AI-powered tool provides real-time insights and actionable feedback to help your team consistently deliver high-quality customer conversations.

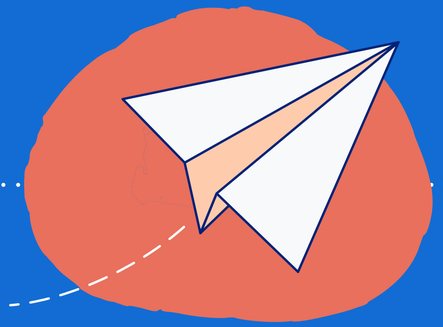
Whether it’s refining how they answer questions or improving their follow-up skills, call coaching ensures your team creates a memorable customer experience.

KEEP TRACK OF NEXT STEPS WITH EASE

Stay organized and ensure every lead receives a follow-up with CallRail's **action plan**. After each customer call, this AI-powered tool cooks up a personalized action plan that outlines the next steps, including:



Scheduling an appointment



Sending a proposal

Following up on important details

No more scrambling to figure out what's next—CallRail's action plan delivers a clear recipe for success, so no lead is left on the table.

Real Talk

"Introducing action plan by **CallRail Labs** into our workflow has been a revelation. It's an intelligent tool that simplifies complex tasks and consistently delivers actionable, data-driven strategies, ultimately improving our overall efficiency. It's a testament to the power of AI and how it can drive meaningful innovation."

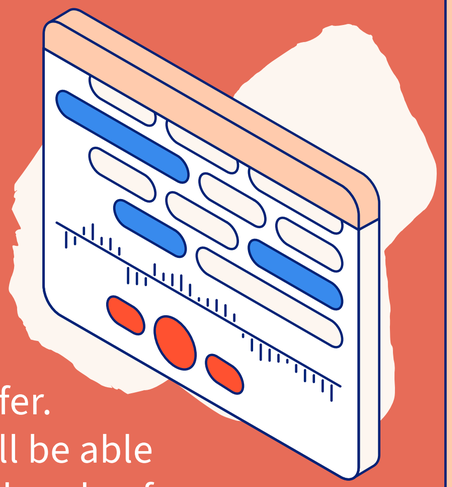
— Baruch Labunski, CEO of Rank Secure

UNDERSTAND CUSTOMER SENTIMENT TO IMPROVE SERVICE

Elevate the customer experience by knowing exactly how your customers feel during every call. With CallRail's **call sentiment** analysis, you can gauge emotions like joy, frustration, or indifference, giving you a clear picture of your customer's true feelings.

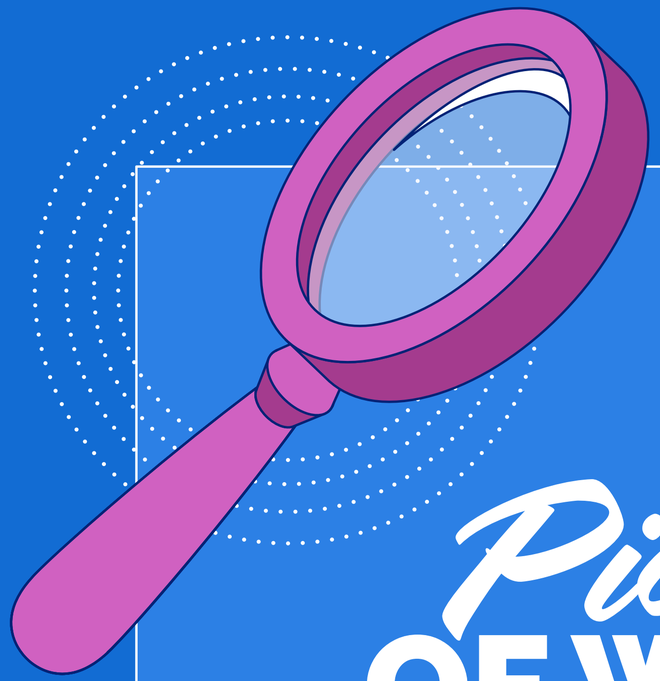
You'll have everything you need to fine-tune your service, leaving your customers more than satisfied.

GAIN *valuable* INSIGHTS INTO WHAT YOUR CUSTOMER WANTS *most*



Gain a competitive edge by uncovering the recurring needs and concerns your customers express during calls with CallRail's **keyword spotting report**. This tool allows you to spot trends that might otherwise go unnoticed, like a growing demand for services you don't yet offer. With these insights created automatically, you'll be able to capitalize on new opportunities without the hassle of manually tracking conversations.

Identifying key customer requests and patterns will allow you to make data-driven decisions that ensure you're offering exactly what your customers want.



GET A *Clear Picture* OF WHERE YOUR LEADS COME FROM

Cut through the clutter of fragmented customer journeys with CallRail's **self-reported attribution.** Capture how customers first discovered your business—whether through:

- personal referrals
- online search
- returning customer

Self-reported attribution automatically tracks and reports customer insights shared during calls, adding the finishing touch to your attribution strategy and ensuring no lead source is left off the menu. Paired with call tracking data, this delivers a well-rounded view of where your leads are truly coming from, so you can fine-tune your marketing efforts.

COMMUNICATE CLEARLY YOUR *Services and Products*

Ensure your customers fully grasp your offerings with CallRail's **questions asked feature**. This tool provides a detailed breakdown of the most frequently asked questions during calls, allowing you to identify where customers might be confused about your services, pricing, or availability.

Powered by AI, the questions asked tool helps you fine-tune your messaging, FAQs, or website content, ensuring that customers have a seamless understanding of your business from the first call.

Real Talk

“The best part is how it uses AI — it's like having a smart assistant that helps you understand your customers better.”

— Marketing & Advertising Agency Owner

Enjoy

EFFORTLESS CALL CLASSIFICATION AND LEAD QUALIFICATION

Streamline your workflow and eliminate the hours of time and the likelihood of errors that come with manual call classification by using CallRail's **automation rules**. This powerful tool automatically tags, classifies, and categorizes calls and form submissions based on predefined criteria, saving you time and ensuring accuracy.

With customizable templates, this tool allows you to:

- Set specific criteria for tagging leads
- Assign value to interactions
- Qualify potential customers

—all with just a few clicks.

No more spending hours on tedious tasks—let automation handle the heavy lifting so you can focus on driving your business forward.

STAY AHEAD OF THE COMPETITION WITH *Cutting-Edge* AI FEATURES

Keep your business on the cutting edge by testing out the latest innovations with **CallRail Labs**. Think of it as your exclusive tasting menu—giving you early access to advanced AI tools before they officially hit the market.

From advanced automation to next-level sentiment analysis, this is your opportunity to sample the newest innovations in AI, ensuring your business stays sharp and ahead of the curve.

Streamline YOUR OPERATIONS & IMPROVE LEAD-TO-CUSTOMER CONVERSIONS

CallRail

Your business faces unique challenges, and CallRail's AI-powered features provide the complete solution. Think of it as a four-course meal—all of CallRail's AI tools working together to supercharge your call tracking, maximize lead-to-customer conversion, and streamline your workflow.

Try all of CallRail's AI features for free for 14 days