Pricing, packaging, and delivering impact:

How to use CallRail to build profitable services at your agency

CallRail

Overview

The value of lead tracking is obvious to most marketers and marketing agencies. But selling this service to your clients is a different challenge. Your customers won't be fully convinced of CallRail's value until they see this solution benefit their business firsthand; however, a strong sales pitch and smart pricing strategy could give your agency the opportunity to revolutionize the phone call's role in your clients' modern marketing strategies.

In this guide, we lay out the information you need to successfully turn CallRail into a revenue-generating opportunity for your agency. It's time to find out what you can do to raise your clients' marketing game to the next level.

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Why lead tracking matters to agencies and their clients

The best argument for any marketing technology is the return on investment it offers to its users. CallRail's value is in its ability to shine a light on performance metrics that aren't currently tracked when your clients receive calls, texts, and form submissions from prospective customers. In order to demonstrate the ROI potential, you first need to highlight the blind spots in your clients' current approach.

Attribution

When prospective customers contact a company that doesn't use call and form tracking, it's often difficult to identify where those prospects came from. Referrals from Google Ads or Google Business listings may be trackable directly through those tools, but what about phone calls, and even website form submissions, that originated from other sources your client's current tools can't track directly? Think social media, website, blog, emails, print ads, or a local trade event. CallRail uses a variety of approaches to deliver accurate attribution of each incoming communication your client receives through the phone or forms. This attribution can then fuel smarter decision-making. Smarter decision-making will inevitably lead to more revenue for your clients— and better client retention for your agency.

Marketing analytics + insights

Attribution is only part of the value offered by CallRail. Performance data can also be gathered from phone and online activities. Missed calls, voicemails, text messages, form submissions, and even in-call performance can all be quantified, qualified, and collected in reports that identify strengths, weaknesses, and opportunities in your client's marketing strategy. Not only does the role of the phone and web forms in your client's business marketing become easier to assess, but its contribution to the overall customer experience can be measured, evaluated, and enhanced through these insights.

Integrations

One of the most important factors to consider when evaluating software for your clients, outside of features and cost, is the ease of implementation. If a tool takes a while to implement for your client, it will also take longer to provide value and illustrate ROI. CallRail works with many other platforms that agencies and their clients work with every day. And if a direct integration doesn't exist, CallRail integrates with Zapier and has a robust API where agencies can pipe client information into whatever platform they're already using.

Insight into paid performance

One of CallRail's greatest strengths is its ability to track and analyze paid campaign performance from multiple paid channels. Through dynamic number insertion, you can discover which ads, keywords, and campaigns bring valuable leads over the phone and on the web. With CallRail, agencies and their clients can track and evaluate paid performance from Google Ads, Microsoft Advertising, and paid social media campaigns. CallRail also directly integrates with Marin, Kenshoo, and Acquisio for smarter bidding.

Integrating lead data directly into CRM systems

CallRail can be fully integrated with your client's existing CRM system, making it easy to aggregate data across platforms. Although this saves your client the trouble of dealing with another standalone analytics solution, it also enhances the current data sets they're using to guide their marketing campaigns. You don't have to choose between lead tracking and other marketing activities — instead, lead tracking can have an enhancing effect on your existing use of marketing analytics. Some of the common CRMs that CallRail integrates with, either natively or with Zapier, and that can be leveraged as selling points include:

➔ Hubspot CRM
➔ Salesforce
➔ Zoho CRM
➔ Pipeline Deals

Integrating with common reporting tools

A common issue that few agencies have solved is how to get a holistic view of the buyer's journey for their clients. With CallRail's robust reporting and integration capabilities, agencies will get one step closer to multi-touch attribution for their clients. AgencyAnalytics, Databox, and Google Data Studio can all easily and effectively pull in CallRail's lead tracking data. This gives clients the full picture of how your agency's marketing efforts are performing.

Which clients are a good fit for CallRail?

CallRail serves small businesses across many different verticals. We've listed some of the most common verticals and use cases:

Small businesses, especially those whose leads come from local search, benefit from CallRail's marketing analytics.

Healthcare offices where the main driver of patients is to schedule an appointment, either over the phone or by form submission.

Legal offices. CallRail works well with legal offices that drive phone calls for qualified matters. Personal injury and civil lawsuits have high costs per click, so CallRail helps legal offices understand the quality of the leads from paid and organic sources.

Home services. When leads are looking for a home service expert in their area, they will see plenty of local businesses. Home services relies on local search optimization for qualified leads. CallRail can help home services clients understand which keywords and sources are driving phone calls and form submissions to their business.

Automotive. Internet leads often pick up the phone before scheduling a test drive to ensure they're working with a dealer they can trust. If you're not tracking calls to your dealership, you're missing out on an opportunity to get internet leads through your door. CallRail can track and analyze the quality of these leads.
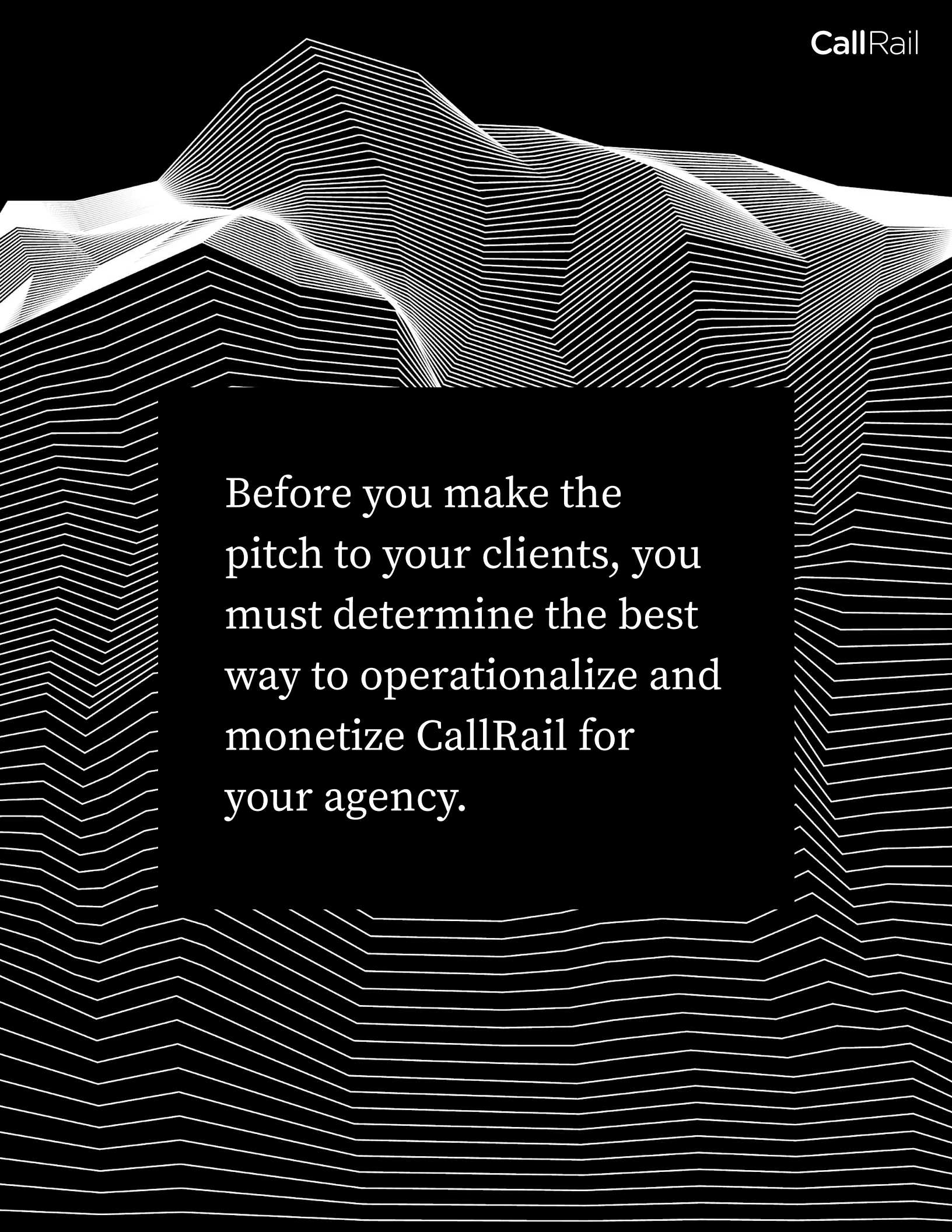
How to package, price, and effectively sell CallRail

Any new or unfamiliar technology faces an uphill battle when it comes to being operationalized and sold to businesses as a new solution. The challenges of adoption can cover a range of sticking points that ultimately hold businesses back from making changes that serve the long-term interests of the company.

Some of your clients have budgetary constraints or other limitations that stand in the way of progress. Other clients simply have an aversion to change, and it takes them time to embrace new approaches to problem-solving.

Whatever the obstacles may be, your agency has the resources and intelligence needed to make a compelling case to your clients for call tracking. Before you make the pitch, however, you must determine the best way to operationalize and monetize CallRail for your agency.

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Tips for selling CallRail

Here's a look at what you can do to convince your clients to take call tracking software for a test drive.

Create awareness for the marketing opportunity

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Your clients are already aware of your brand, and have an implicit trust in your agency's guidance. The next step is to create familiarity with CallRail as a valuable component of their marketing strategy.

This familiarity can be developed gradually through your conversations with the client. As they hear you discuss lead tracking software, they might have their own questions about the solution and how it can benefit their business. Either way, you can use this awareness of call and form tracking to ease clients into a conversation about whether this service could help them reach their marketing goals.

Every client will react to new ideas their own way. The ideal client will be open-minded and demonstrate a low resistance to new approaches. If you're just starting to incorporate CallRail into your agency's offerings, it's best to target clients who show a willingness to be creative and innovative. As you approach additional clients with this marketing opportunity, you can refine your pitch and be better prepared for clients who aren't as eager to add something else to their plate.

Build for scale

Agencies are hyper focused on growing their clients' businesses, but how can an agency ensure they're growing, too? Historically, agencies have bought software on behalf of clients and upcharged to make a margin.

But in the new world of transparency and partnership, clients have different expectations. Reporting meetings are becoming conversations, not just read outs. Clients are more bought into their marketing success than ever, which can also mean they are more discerning about how their money is spent.

When your clients are laser-focused on how their funds are allocated across channels, agencies have to ensure that they're spending money (and making money) in a transparent way to clients.

Pro tip: keep it straightforward

Your agency can charge a flat rate or percentage of CallRail's invoice, depending on how your billing structure is set up.

Consider the time it takes you to set up when first onboarding clients to CallRail, and ensure that time is accounted for when invoicing your client that month.

Once you've completed setup and client onboarding, note how long you spend in a client's CallRail account per week. As you become a CallRail expert, you'll become more familiar with setting up and maintaining a client's account, and onboarding new clients may take less time.

For CallRail management reflected in client invoices, we typically see agencies fold the cost of setup and maintenance into a general marketing management bucket or specific CallRail management.

We recommend having a specific CallRail management line item so clients fully understand how you're allocating your time and resources across tools.

Building your CallRail services

Although there are definitely revenue share opportunities from CallRail available to agencies, the real revenue opportunity lies in the implementation and management of CallRail. You have the option to sell CallRail services as a one-off or bundle them with other services you already offer. Whichever you choose, some ways to drive sales through CallRail services include:

➔ Initial configuration of CallRail, which requires account setup, tracking down online and offline phone numbers, web forms, and integration into key client systems such as their CRM or Google Ads

➔ Configuration of multi-channel attribution reporting

➔ Training and education of how to manage and monitor CallRail with your internal team

➔ Weekly, monthly, or quarterly reporting and analysis of call and form analytics

➔ Ongoing management and maintenance of phone tracking and integrations

➔ SMS texting strategies and tracking

➔ Sales enablement such as sales qualification, routing, and call analysis

Address the client's concerns and constraints

Even eager clients will want to do their due diligence before committing to the time and cost of implementing call tracking. As an agency, you should always connect new marketing solutions to the business problems they solve. With CallRail, the most common concerns revolve around a lack of insight into lead data, as well as a lack of standards and knowledge to replicate success regarding inbound calls, phone interactions, and form submissions. Poor visibility into sales is another pain point a call tracking solution can address.
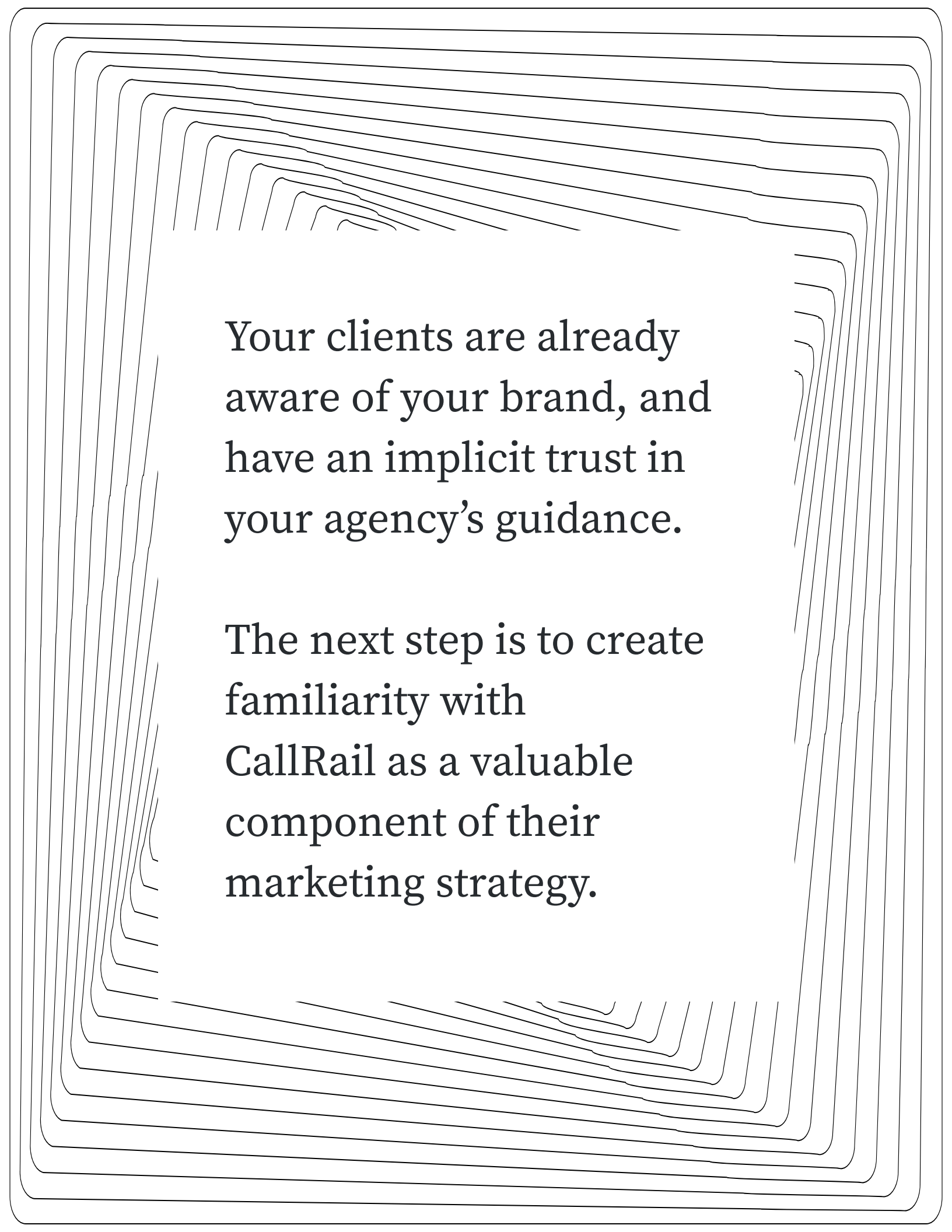
Budget constraints are often cited by clients whenever new expenses are proposed, so emphasize the value of accurately measuring ROI and using this performance to enhance how other marketing campaigns use calls to increase engagement with customers. CallRail can illustrate the value you're getting in return for your spending, and data-driven insights can help you prioritize resources and campaigns to push those earnings even higher.

Lastly, clients may have an inclination to resist change. You should counter their position by emphasizing the risk of waiting too long to embrace new marketing solutions. Every week that goes by without a call tracking solution in place, your clients are sacrificing valuable data they will never be able to recover. Meanwhile, the ROI offered by these solutions keeps getting pushed farther down the road, delaying the sales and marketing progress your clients need to achieve their growth goals.

As those clients avoid call tracking, they open the door for their competition to adopt the same technologies and use them to create value that your clients brushed to the side.

The cost of waiting is significant.

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Highlight case studies showcasing the benefits of CallRail

Your clients will have varying degrees of familiarity regarding call tracking, but the technology itself has driven proven results for other early adopters. Seek out case studies that demonstrate the real-world value of call tracking (7) in a wide range of business use cases. Examples of success using CallRail include:

➔ An automotive company that tripled inbound leads after adopting CallRail and merging its analytics (8)
➔ A mold remediation company that used call tracking to double daily call volume (9)
➔ A digital marketing agency that used call tracking to reduce its clients' cost per lead by 90 percent (10)

(7) Call Tracking Case Studies
callrail.com/blog/category/case-studies/

(8) The Humberview Group Case Study
callrail.com/blog/humberview-callrail-automotive-case-study/

(9) Mold Busters Case Study
callrail.com/blog/call-tracking-for-home-services-mold-busters/

(10) 5 agency success stories proving the benefits of call tracking
callrail.com/blog/agency-roi-call-tracking-success-stories/

The value of CallRail isn't hard to demonstrate.

Focus on positioning this software as a solution to problems that have been plaguing your clients for years. They just haven't noticed the problems because they were invisible — until now.

Becoming an Agency Partner

As an Agency Partner, you'll get an insider's view of CallRail, dedicated sales support to help you resell CallRail, and exclusive educational and marketing resources. As you bring more clients to CallRail, you'll level up in the Agency Partner tiers. You'll be recognized and rewarded for your success with revenue sharing, additional resources, and a greater visibility in our partner directory.

Partnership can be a great option for agencies with a strong sales team, because the partner role creates additional resources, exposure, and marketing opportunities that agencies might be able to leverage to attract new clients. At CallRail, for example, partner program members receive marketing support that can include:

- → Eligible for co-marketing
- → Guest blogging with backlinks
- → Opportunity for revenue share
- → Speaking opportunities
- → Inclusion in the CallRail Agency Directory

What's next?

You know how to position call tracking as a value-added service for your agency's clients. Now there's only one thing left to do: Start using CallRail to grow your agency!

Over 1,000 agencies are members of CallRail's Agency Partner Program. When you join, you'll receive access to exclusive content, specialized sales support, and marketing resources that will help you retain more clients and expand your business. You'll also gain access to CallRail's private agency community, where you can share tips and insights among fellow partner programs, ensuring that your agency stays on the cutting edge of marketing innovation.

No matter what path you choose, it's easy to get started. [Sign up for a free trial today](#) to find out how CallRail can help your agency grow!

CallRail