CallRail

CallRail's Secret Menu

Features you didn't know you were missing out on

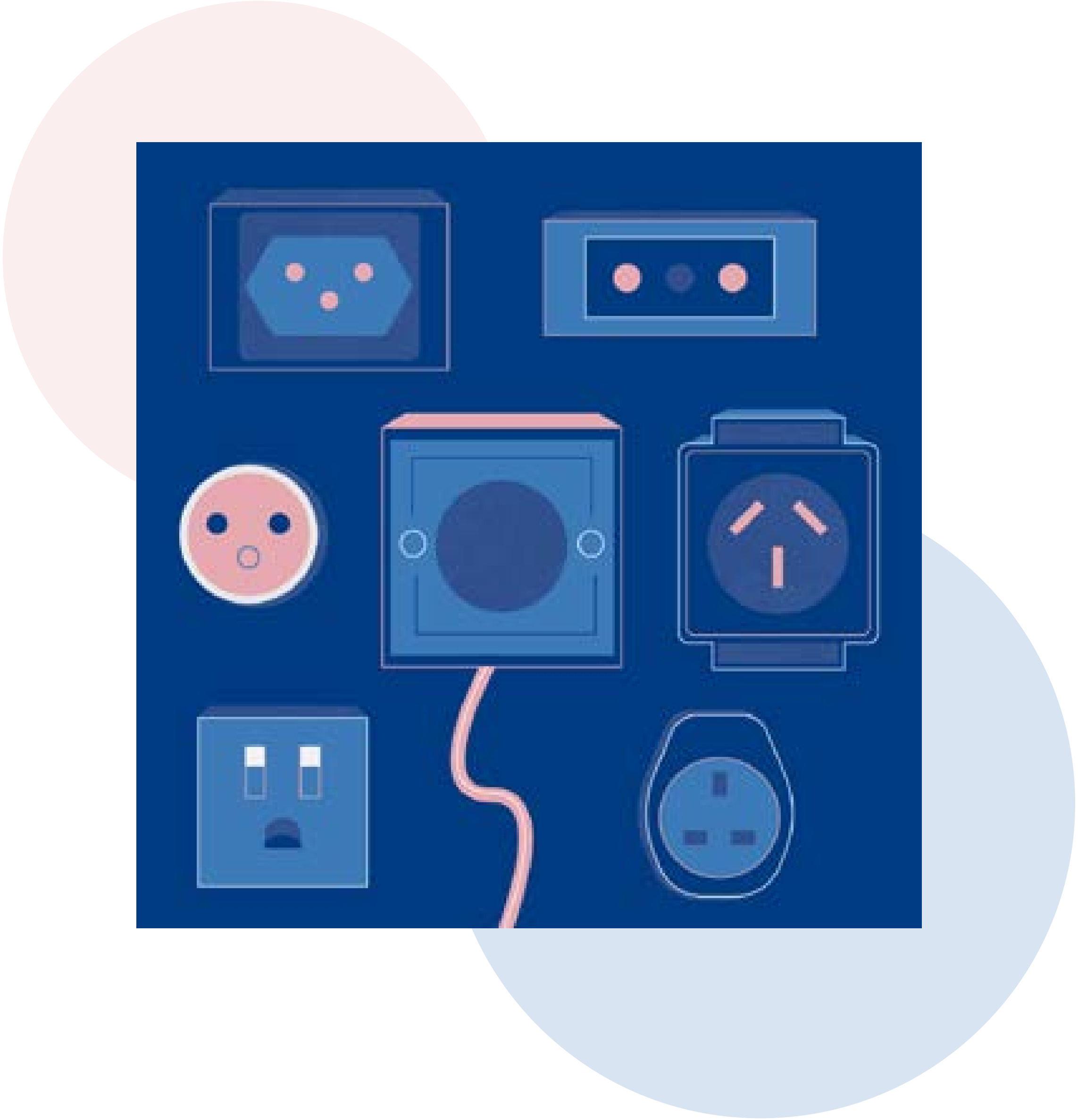
Maximize your use of CallRail

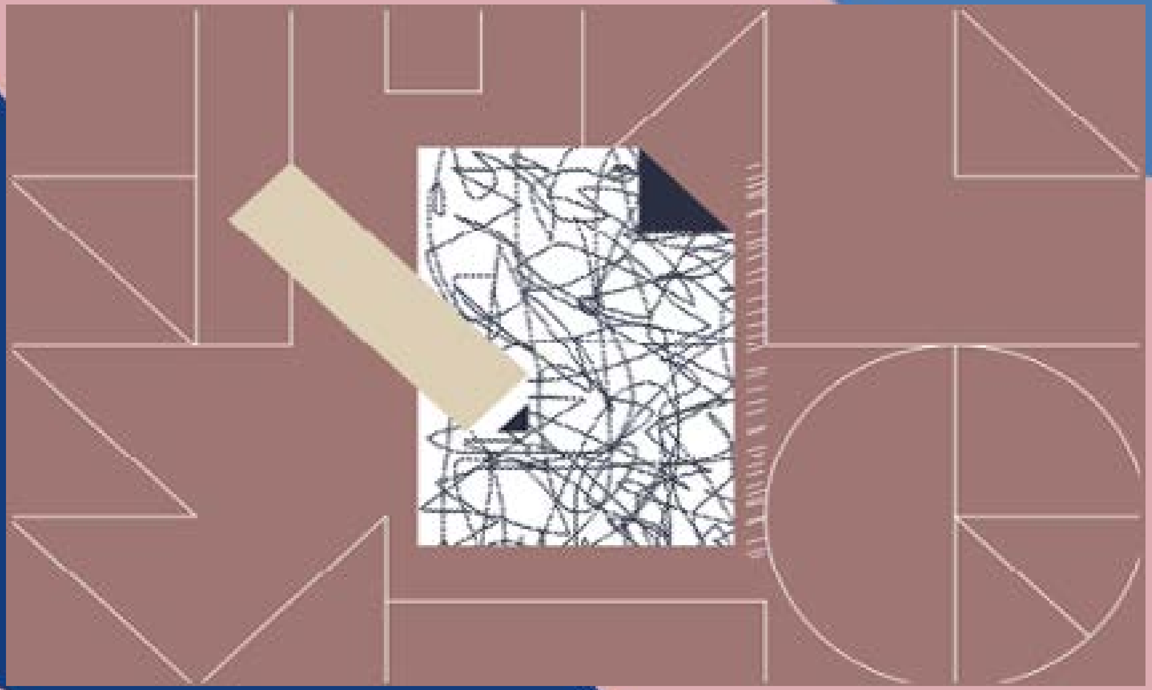
Chances are you're already tracking all your phone calls with CallRail. You're meticulously creating new Call Tracking numbers, assigning them to new campaigns, and getting a clearer picture of your marketing's performance and the people on the other end of the phone.

It's also likely that you're 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:

Communication

Customers today expect quick and immediate responses to their questions and concerns when engaging with a business. Not only is it important for them to get a speedy response, but it can make or break their chances of doing repeat business with you.

Features like Call Flows, Automated Responses, and Form Quick Responses help you improve customer response rates — increasing your following of loyal brand advocates. Let's take a closer look.

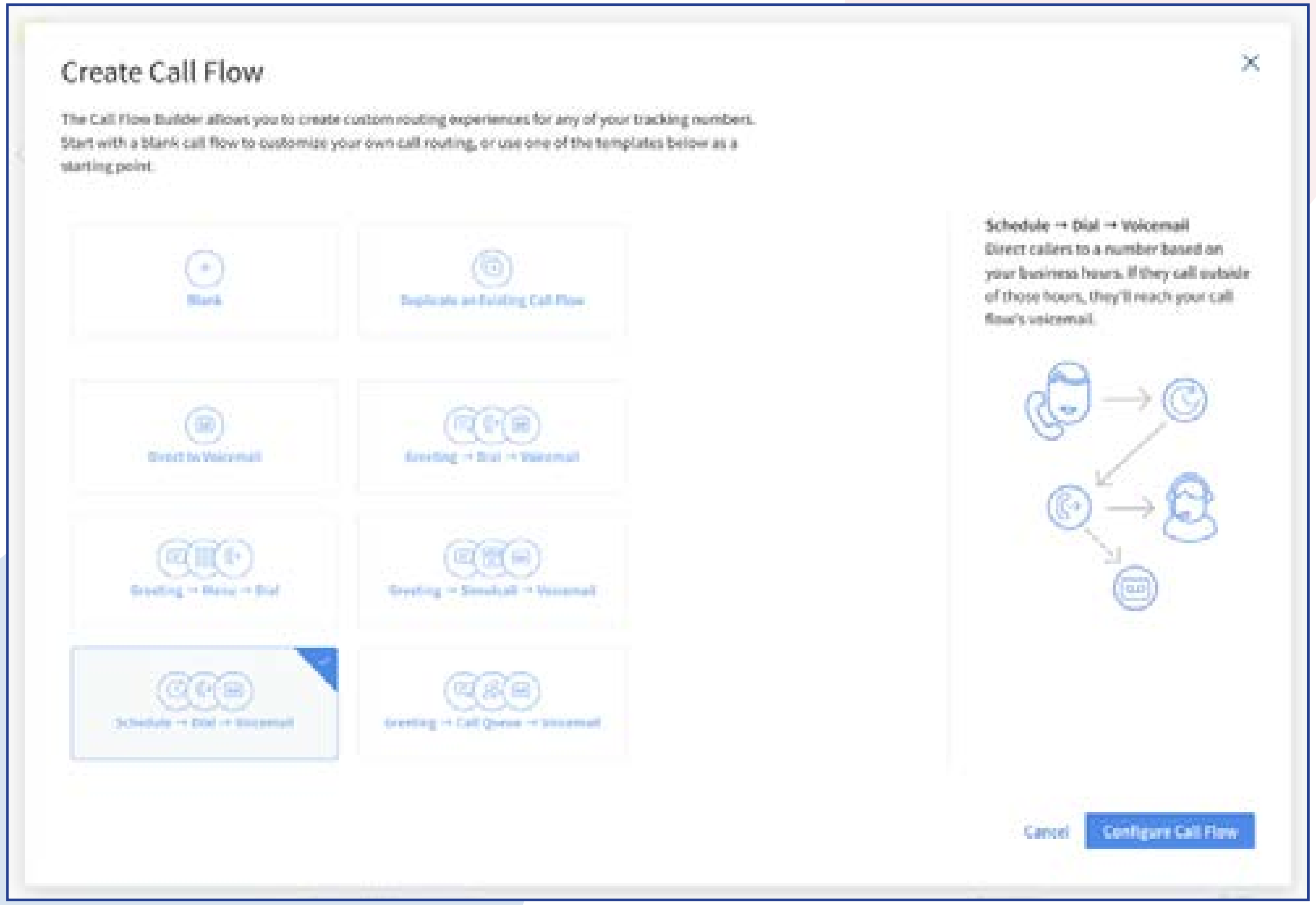
Call Flows *(requires: Call Tracking)*

First impressions are important. Even more so on that initial phone call with a prospective customer. 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 allows you to set the right tone by giving you the power to create a routing system that takes care of callers from the moment they connect to your tracking number. And custom greetings can be recorded that tells them how to navigate your call flow.

There are 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.

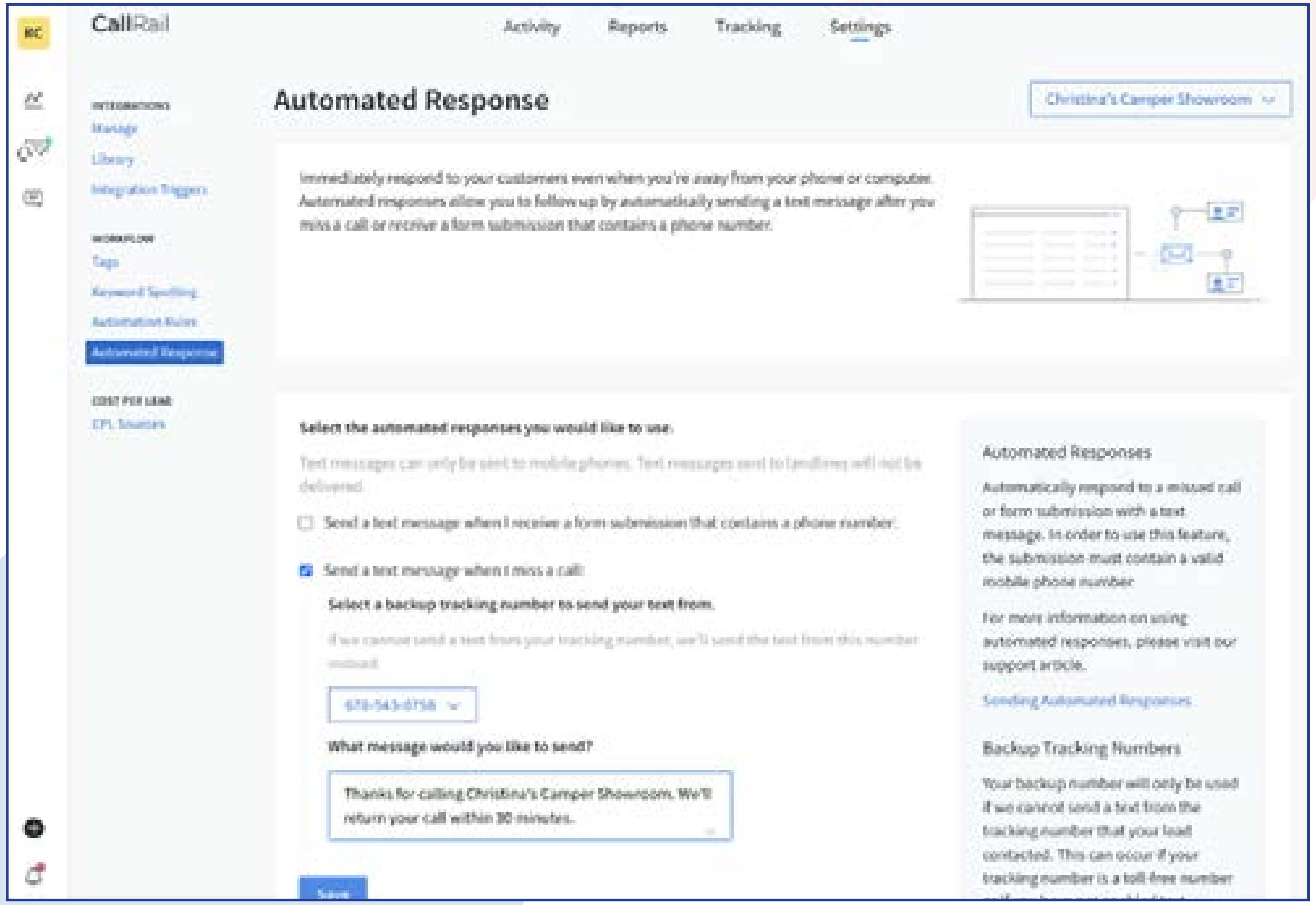
If you're looking for something more custom, you can easily build a Call Flow from scratch and duplicate and assign it to your Call tracking numbers of choice. Whatever the need, the Call Flow Builder tool in Conversation Intelligence can be easily tailored. [Explore all the templates in this article.](#)



Automated Responses *(requires: 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 Reponses on here.]

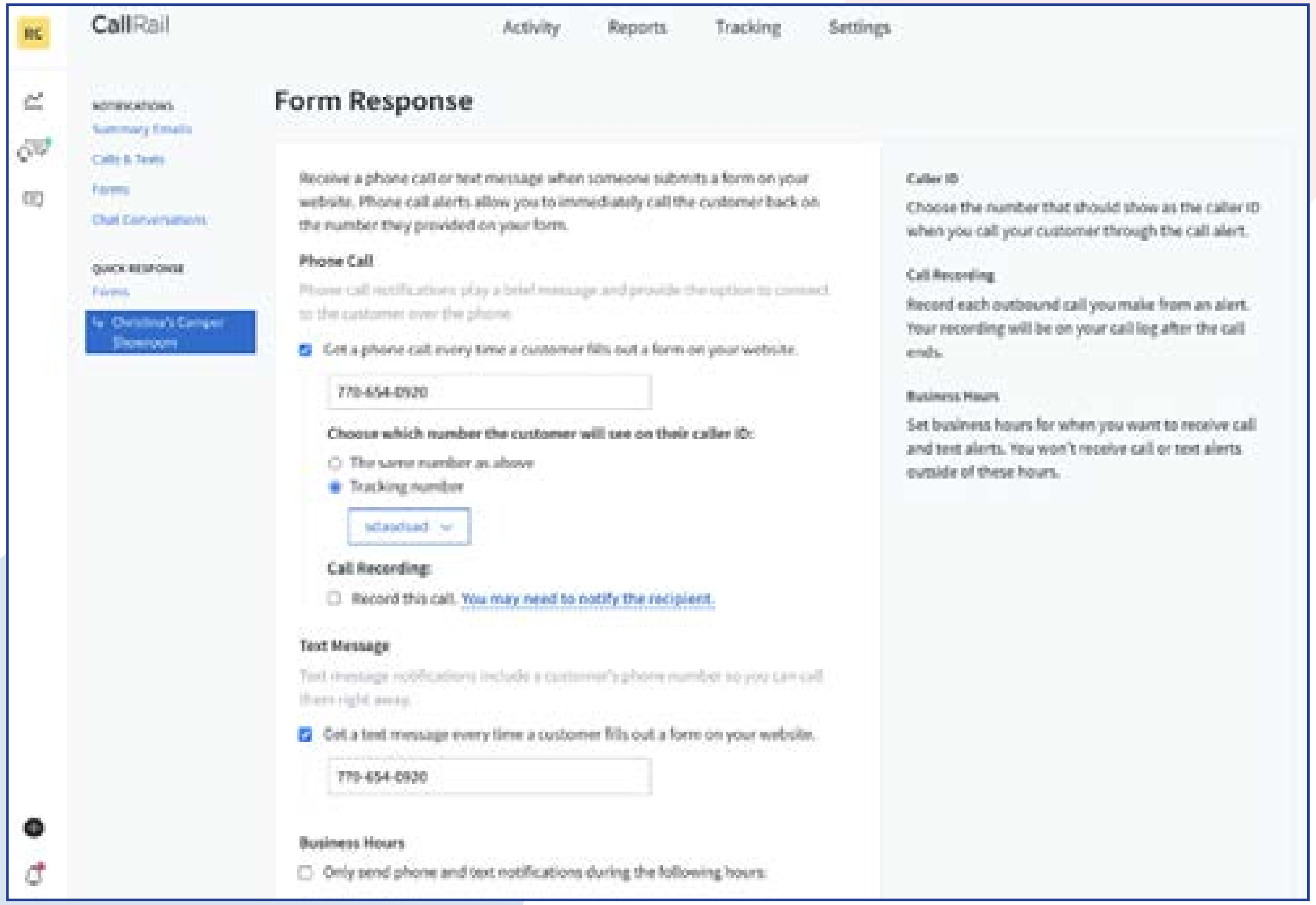


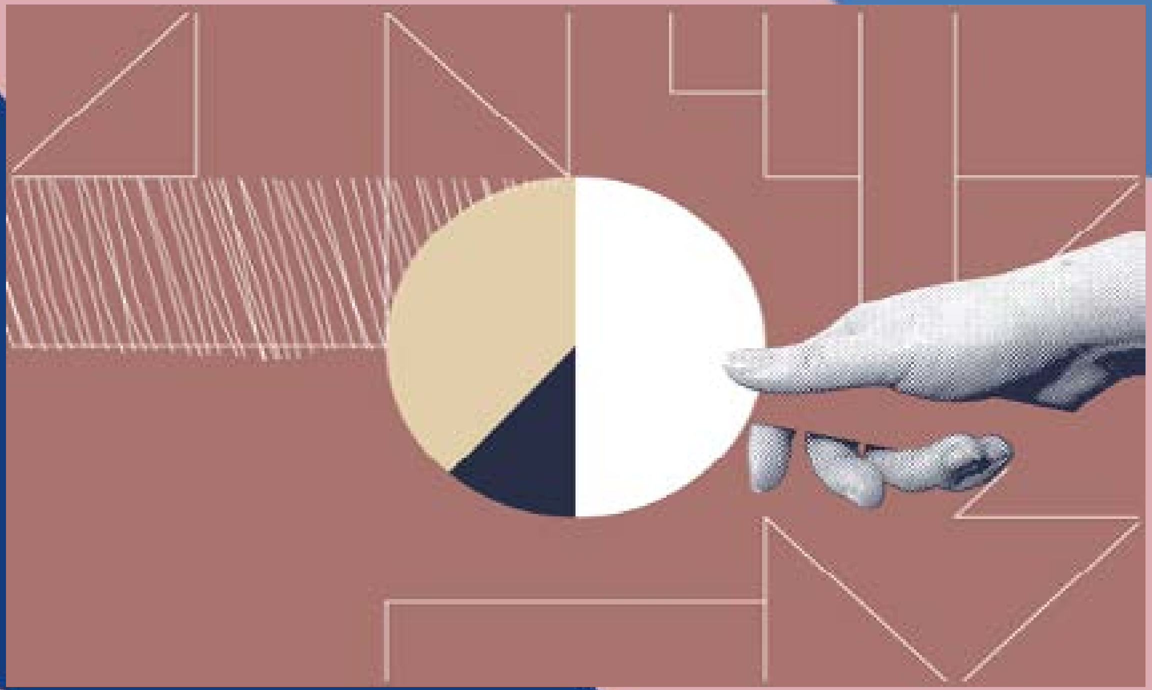
Form Quick Responses *(requires: Form Tracking)*

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 them directly from the notification.

So, if Anna 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.]





Section 2:

Reporting

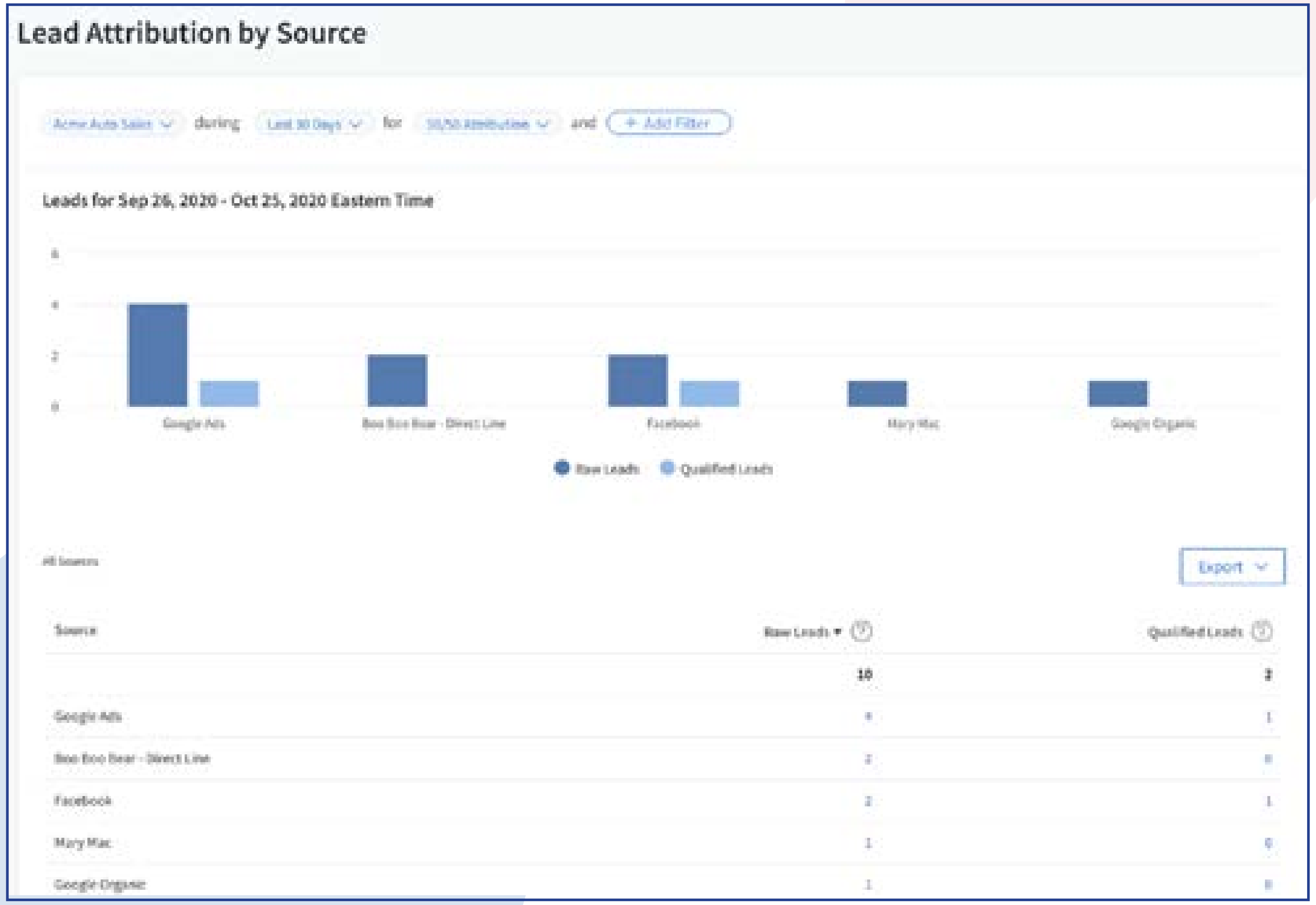
Providing a seamless customer experience across all your communication channels is only one part of the equation. Another is distilling the insights behind your calls to make better marketing decisions.

CallRail attribution reports reveal which campaigns drive the most qualified leads. They also pinpoint which keywords and phrases you should be bidding on for more effective pay-per-click (PPC) campaigns.

Overall, you'll get a better picture of where you should be spending your marketing dollars.

Lead Attribution by Source *(requires: Call Tracking)*

If you're focusing on filling the top of your funnel with leads, then Lead Attribution by Source is the report you need. Available with all Call Tracking plans, this report allows you to see which ads, keywords, and campaigns are driving the most qualified leads. After all, you don't want to spend valuable resources on lukewarm ones.



The Lead Attribution by Source report also unlocks additional insights such as different interaction types by the sales funnel phase using multi-touch attribution. Here's an example. Suppose a lead filled out a form. A couple of days after submission, they give your business a call. The Lead Attribution by Source would capture the same lead and give each interaction credit at the right part of the sales funnel.

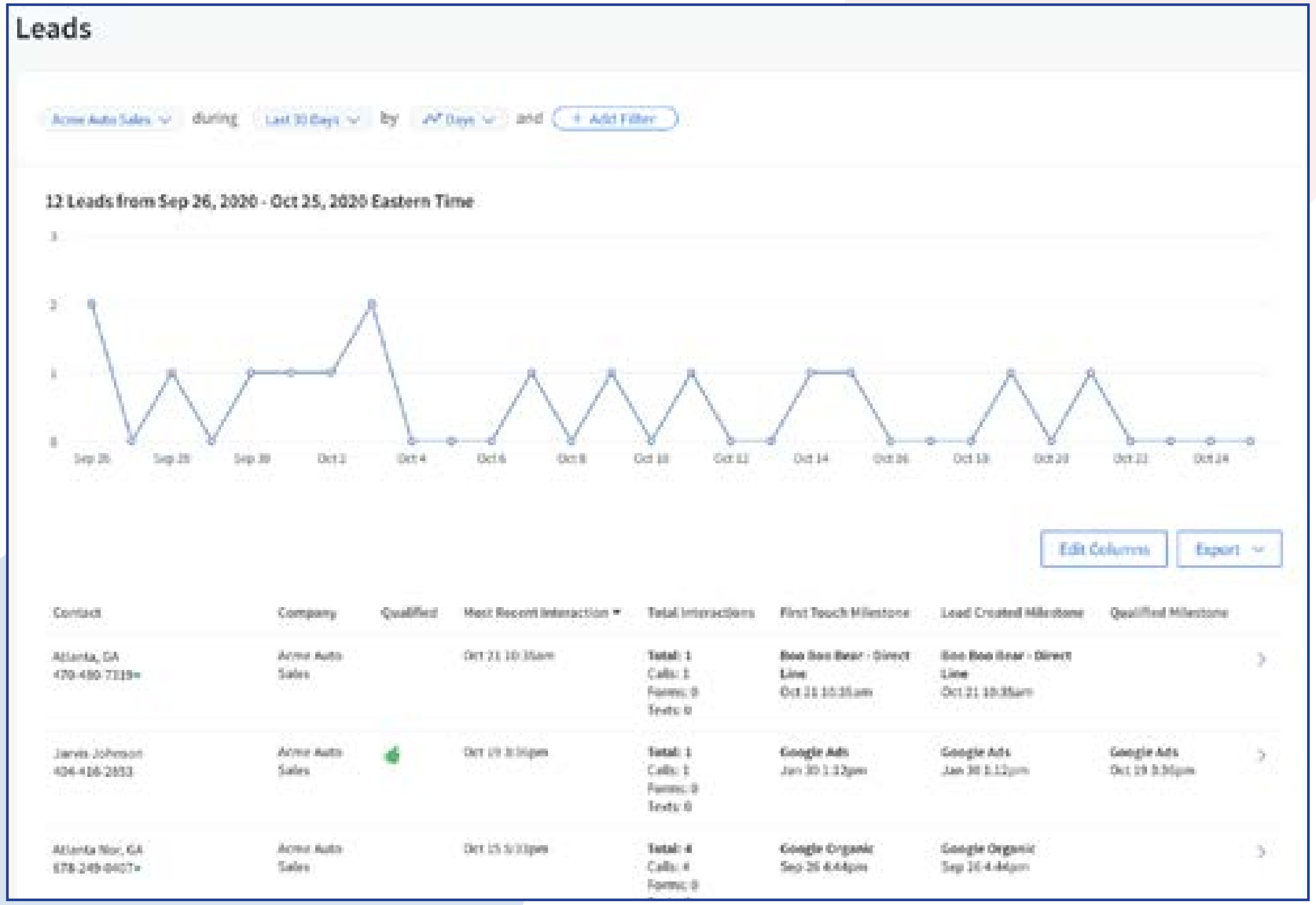
The value here is that you get to see what works best for different funnel phases, which helps you better plan your marketing efforts — expediting the process from lead to loyal customer. Check out this article to step up this report in your Call Tracking account.

Leads Report (requires: Form Tracking)

Have you ever wondered what each customer's journey looked like? If you knew, planning your marketing campaigns and efforts would be so much easier — and much more effective. The Leads Report dispels the shroud of mystery surrounding your lead's customer journey by letting you analyze all the touchpoints they've had with your business from TOFU to BOFU.

So if a lead first interacted with a social ad, landed on your pricing page, and then submitted a form — all of these touchpoints are collected and visualized in this single report. The leads report is only available if you have Form Tracking.

The benefit of this report is that you get to see all of your leads in one place, at a glance – sans spreadsheet. No more tracking calls, form submissions, and texts on multiple platforms. Here's how you can turn this reporting on in your account.



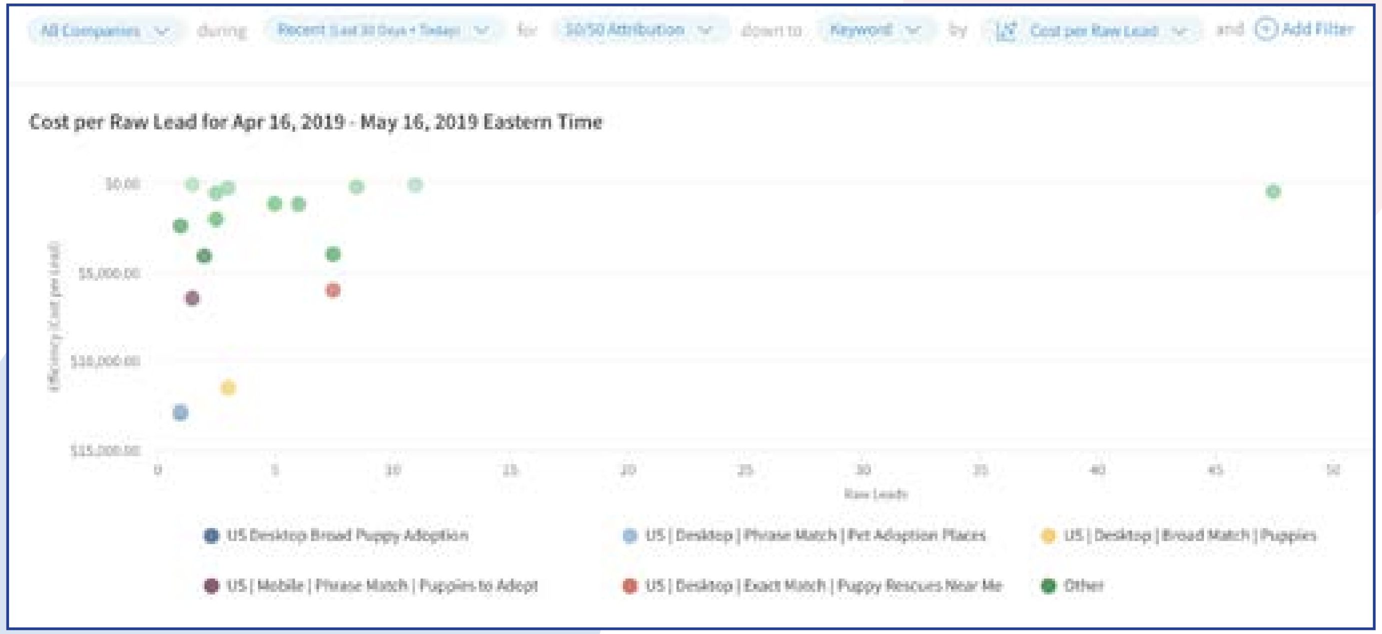
Cost Per Lead *(requires: Form Tracking)*

Running PPC ads can get costly quickly. The right insights can help you optimize your ads, which leads to lower costs — and higher quality leads . If you have Form Tracking, then you're in luck.

Form tracking lets you run a Cost Per Lead report for each of your digital ad channels. Yes, that applies to Google Ads, Facebook, and Microsoft advertising campaigns. With this report, you can drill down into the cost per lead by campaigns, ad groups, keywords, and individual leads.

The report will also show you the most cost-effective way to acquire a lead — allowing you to optimize your digital ads in real-time. You can even dig deeper into the data to compare raw leads against qualified leads. The end result is added clarity on how you should be spending your marketing dollars.

And if you're a super savvy marketer, you can change the attribution model for how the cost per lead is calculated. Learn more about this powerful tool here.



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 report available on 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 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. The report also highlights the words that were used to mark a qualified lead.

As you look through the data, you'll have a better sense of how to update your lead scoring so you can focus on the leads that matter. [Explore the possibilities of this report here.]

Key Terms Spotted ***(requires: Conversation Intelligence)***

The Call Highlights report 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 keep track of them with the Key Terms Spotted report.

Housed within Conversation Intelligence, the report 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.

Section 3:

Organize

Once you have the communication and analysis aspects of the lead management equation down pat, it's time to focus on organizing them. Organizing your leads based on where they are in the funnel gives you a good idea if your leads need further nurturing or if it's time to throw it over the fence to the sales team to seal the deal.

Our latest feature — Automation Rules — helps you categorize your leads more effectively. You just need to have Conversation Intelligence to get started. Let's take a closer look.

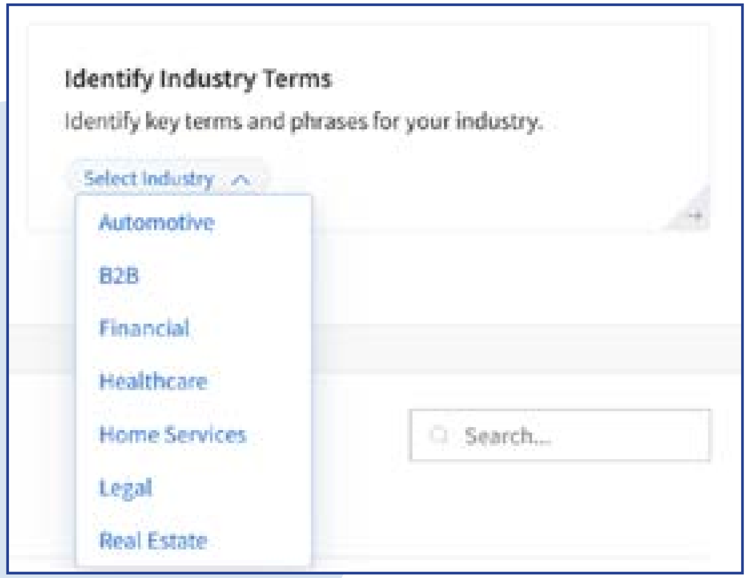
Automation Rules *(requires: Conversation Intelligence)*

There's nothing worse than spending valuable time and money on a lead that is not ready to convert. Automation Rules organize leads for you so you can focus your energy on the one that matters most.

Through Conversation Intelligence, you can set up criteria that automatically tags a call as a sales-ready lead or not. For example, say your business is in home services, and you want to only hone-in on calls that where customers mention the word "quote" or on calls longer than five minutes.

You can set up Automation Rules to tag those calls where those criteria are met automatically. Automation Rules then collects this data, which you can then filter based on your tags. You can create as many tags as you want and have them set up for specific categories, like conversions or customer satisfaction.

There are multiple ways that you can configure the tool to fit your needs and objectives. And if you need help, we're always here to answer any questions or concerns. [Learn more about Automation Rules here.]



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 the plan you're on, everyone gets Call Flows, Automated Response, and Lead Attribution by Source. All you have to do to leverage the power of these tools is to turn them on.

Experiencing the rest is as easy as signing up for a FREE 14-day trial. And as you already know, you can contact our support team at any time to learn more about these features or if you need help getting started.

Start a free trial