



Introduction to CallRail



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## What is CallRail?

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CallRail is an intuitive and powerful call tracking solution for data-driven marketers and measures call conversions from search, offline and digital marketing campaigns, including PPC keywords. Call recording allows easily qualifying leads, improving customer service and coaching the staff. The software also makes it easier to review and annotate phone calls.

Full visitor journey can be captured before and after the call, while tracking phone number can automatically be shown to the right audience. Call tracking tools allow managing multiple locations, clients or even companies from a single account, helping businesses to improve ROI. New call tracking numbers can be setup in no time and the call flow builder makes it easier to create custom call routing for businesses.



## CallRail features

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Main features of CallRail are:

- ✓ Keyword Call Tracking
- ✓ AdWords call tracking
- ✓ SMS/Voicemail
- ✓ Static & Offline Call Tracking
- ✓ Call Analytics Dashboard
- ✓ Calls sent to multiple phones
- ✓ Call Scheduling
- ✓ Call Follow Up
- ✓ Visitor & Keyword-Level Tracking
- ✓ Agency call tracking
- ✓ Dynamic Website Call Tracking
- ✓ Email Notifications
- ✓ In-Depth Caller Context
- ✓ Call recording
- ✓ Campaign-Level Call Tracking
- ✓ Local & Toll-free numbers
- ✓ Custom call flows
- ✓ Visitor Timeline
- ✓ Dynamic number insertion
- ✓ Quick setup
- ✓ SIP Routing
- ✓ Lead Capture
- ✓ Multi-Channel Call Attribution
- ✓ Interactive Menus



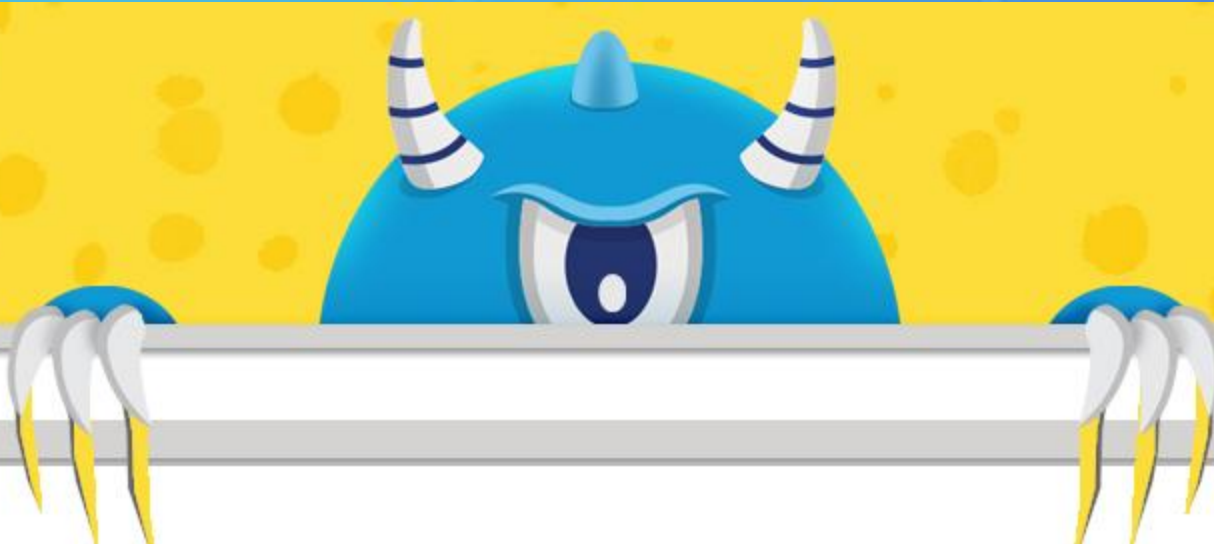
## Overview of CallRail Benefits

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CallRail assists in understanding which sites, campaigns and search words are driving conversations. Visitor timelines show the complete journey of a customer through your website. The conversion data is fed directly into Google Analytics and also optimizes AdWords call tracking campaigns, allowing phone calls to be tracked like conversions. Real-time reporting notifies instantly when a call is received and lets users understand which campaigns are performing best and delivering highest ROI.

The solutions also helps identify which marketing channels are producing more calls and also measures phone leads received from offline marketing efforts such as radio, TV, direct mail, newspaper and brochures. Knowing more about the customer ultimately results in more closed deals and enhanced revenues. The information gathered from email accounts, call logs, ad campaigns and premium caller ID databases offer in-depth and contextual details about callers.

The Call Analytics Dashboard provides unprecedented details about individual calls and helps visualize trends and understand high-performing campaigns. Email notifications keep users in loop all the time and allow them to see when leads come in. Visitor timeline shows how visitors browse the website and what particular pages they have been reading and what actions they took after the call. This makes it a lot easier to identify the webpages that deliver the most phone calls. The solution can also be integrated with a number of marketing, sales and analytics software, including Google Analytics & AdWords and Salesforce. It also supports SMS, voicemail transcription, call follow up and lead capture.

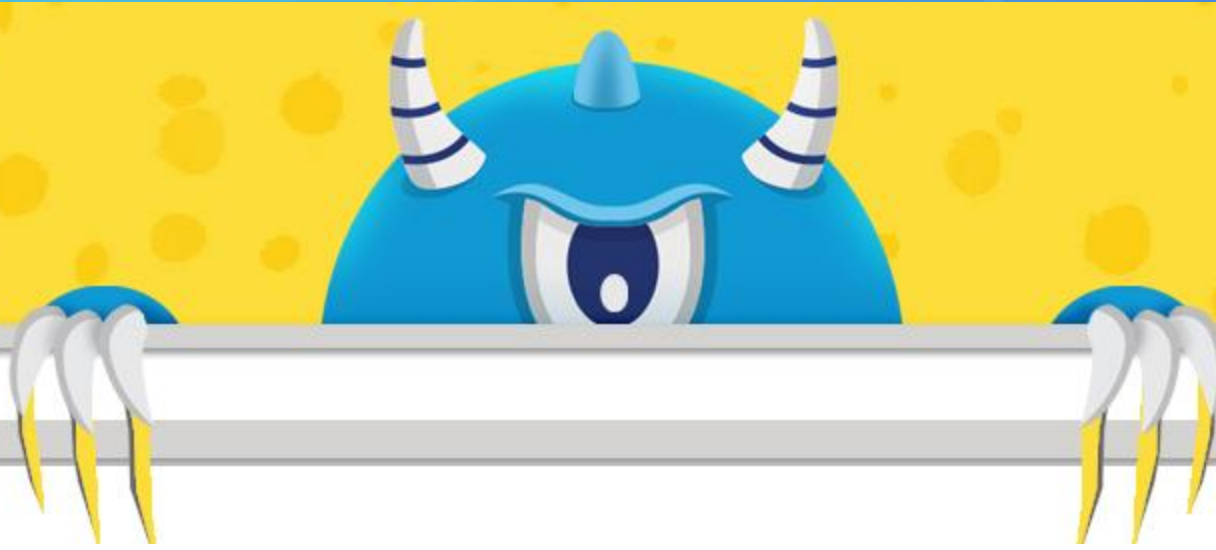


As an agency, some of our primary use at MediaBeast for CallRail include:

- Measuring client results across multiple channels and campaigns. (OTT, PPC, SEO, Offline, Display, etc.)

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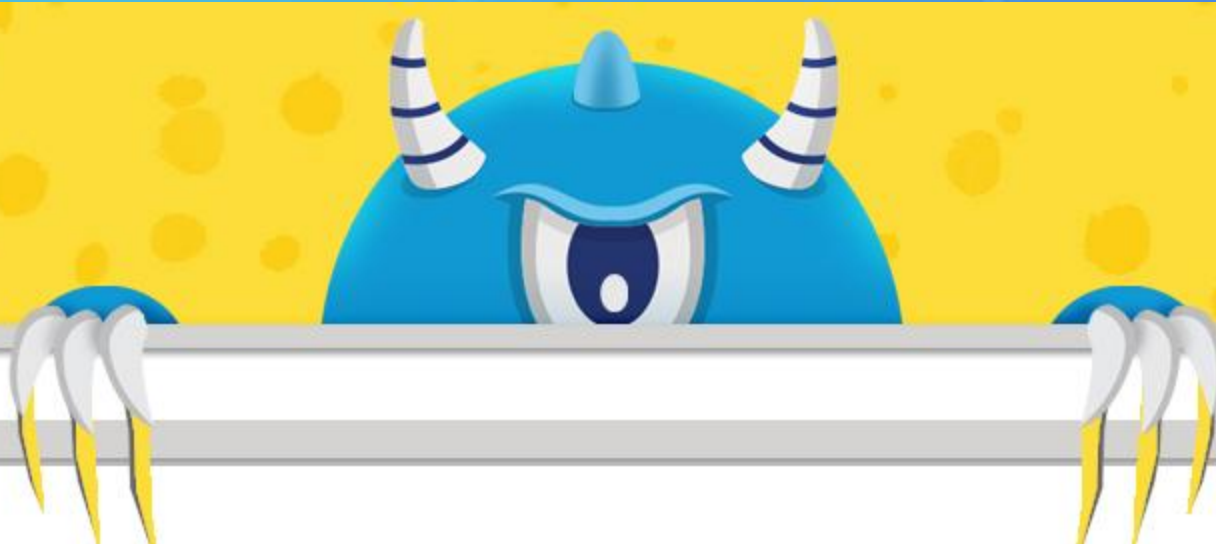
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- Measuring client results across multiple channels and campaigns. (OTT, PPC, SEO, Offline, Display, etc.)
- Tracking additional metrics, **such as call length**, which helps them measure if the caller has legal intent. For example, if a call is less than two minutes long, the lead generally isn't valid based on the intake process.

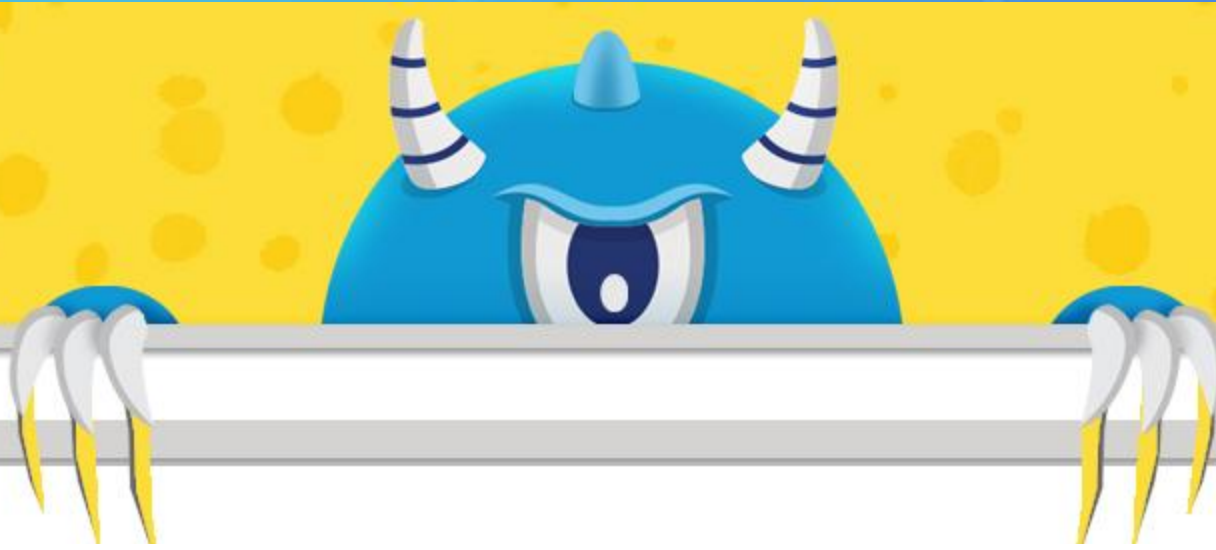
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- Seamlessly adding tracking numbers on websites and landing pages using CallRail's number swapping feature.

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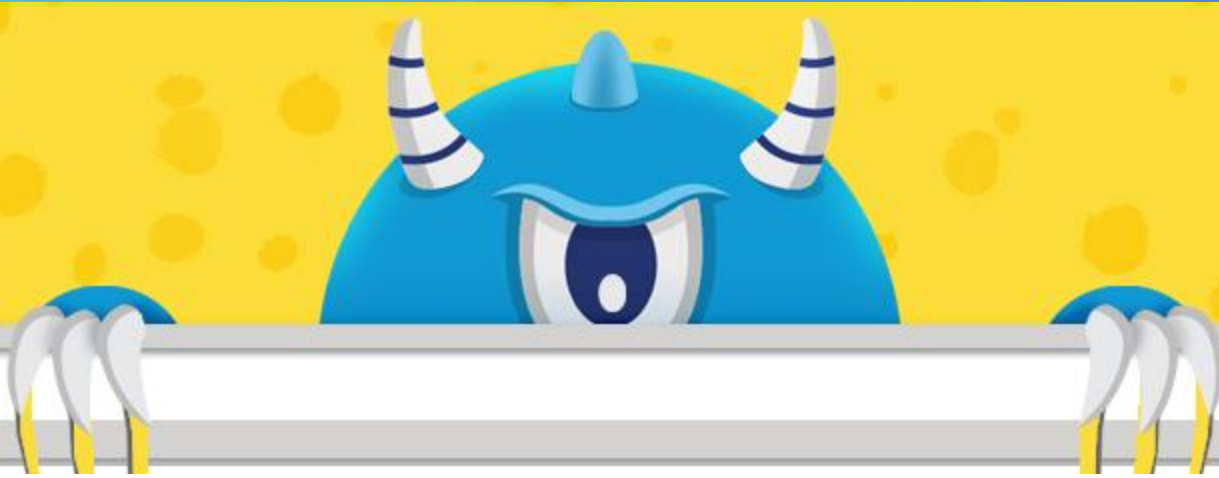


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## Lead Attribution by Source

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Attribution models allow you to distribute credit between milestones to know which marketing sources and campaigns are driving leads at what points in the sales funnel.

For example, maybe a certain Facebook campaign is where most of your First Touch milestones occur, but more customers actually pick up the phone when they see a specific banner ad. Having that information can help you tailor your content for those first touch customers and invest in only the most effective marketing sources.

Attribution models allow you to weigh milestones differently based on the portion of the sales funnel you're looking to optimize. For example, if you want to know which ads create the most first-time engagements for leads, you'd use a First Touch Model. If you're more interested in learning which ads create the conversion action of calling your business, you'd use a Lead Creation Model. If you're interested in both, you can assign half credit to both the First Touch and Lead Creation milestones using the 50/50 Model.

## Attribution Models

**First Touch Model:** 100% credit to the first touchpoint a customer engaged with.

**Lead Creation Model:** 100% credit to the last touchpoint before a customer calls/texts one of your tracking numbers or submits a form and becomes known to your company as a raw lead.

**50/50 Model:** Split credit evenly between the First Touch milestone and the Lead Creation milestone, 50% on each.

**Qualified Model:** 100% credit to the last touchpoint before a customer is scored as a qualified lead. Leads can be scored manually or through CallScore.

**W-Shaped Model:** Credit is split evenly between the First Touch milestone, Lead Creation milestone, and the Qualified milestone. Each of these touchpoints receives one-third attribution credit in this model.



## Lead Attribution by Source

Leisure Depot ▾

during

This Year ▾

for

50/50 Attribution ▾

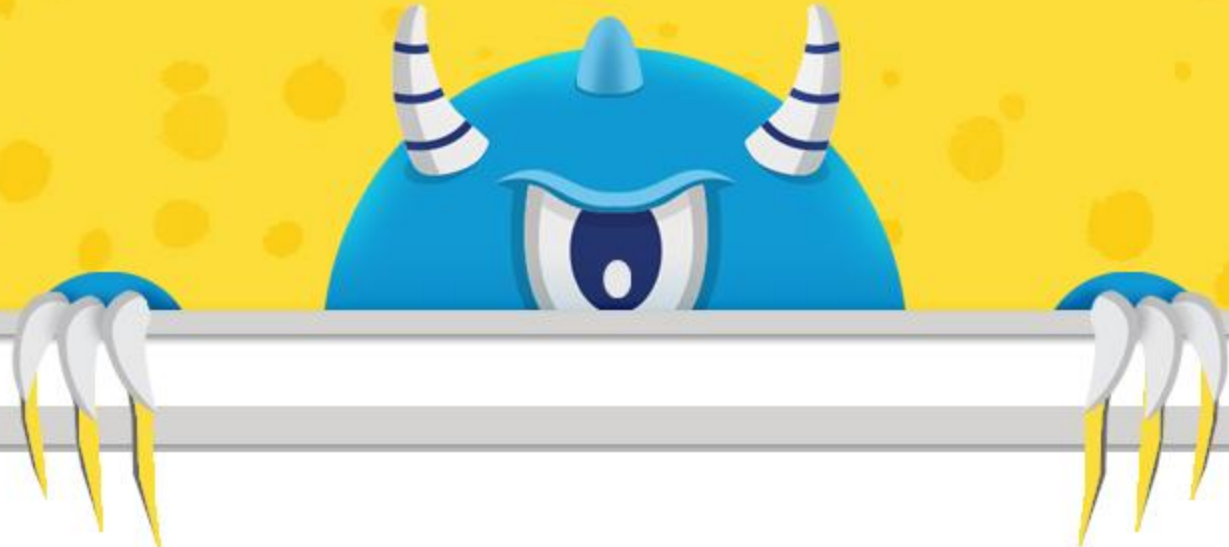
and

+ Add Filter

### Leads for Jan 1, 2021 - Apr 22, 2021 Eastern Time



Source	Raw Leads ▼ ⓘ	Qualified Leads ⓘ
	1496	857
Google My Business	939	725
Google Ads	266.5	107
Google Organic	127.5	8
Direct	81	3.5
Eblast - MMG	17	0
Direct Mail - Customer Appreciation Event	16	13
Bing Organic	14.5	0
Eblast - Adams	13	0
Yahoo Organic	5.5	0
DuckDuckGo Organic	4	0
shopleisuredepot.com	4	0
results.searchlock.com	1	0
Facebook Organic	1	0
MMG.Facebook	1	0



Attribution Models



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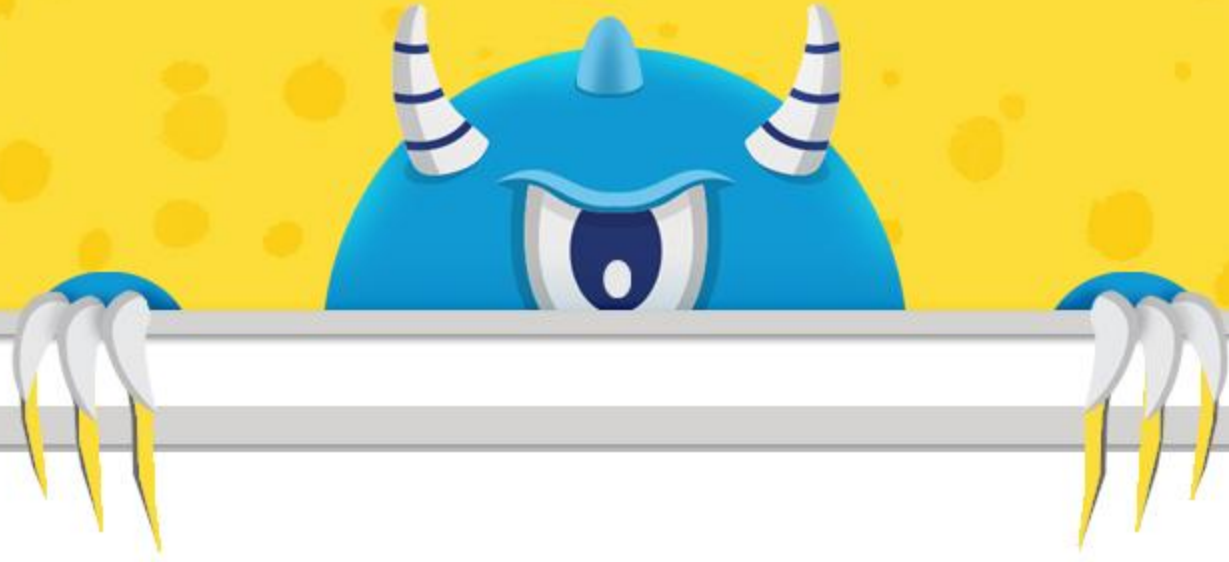
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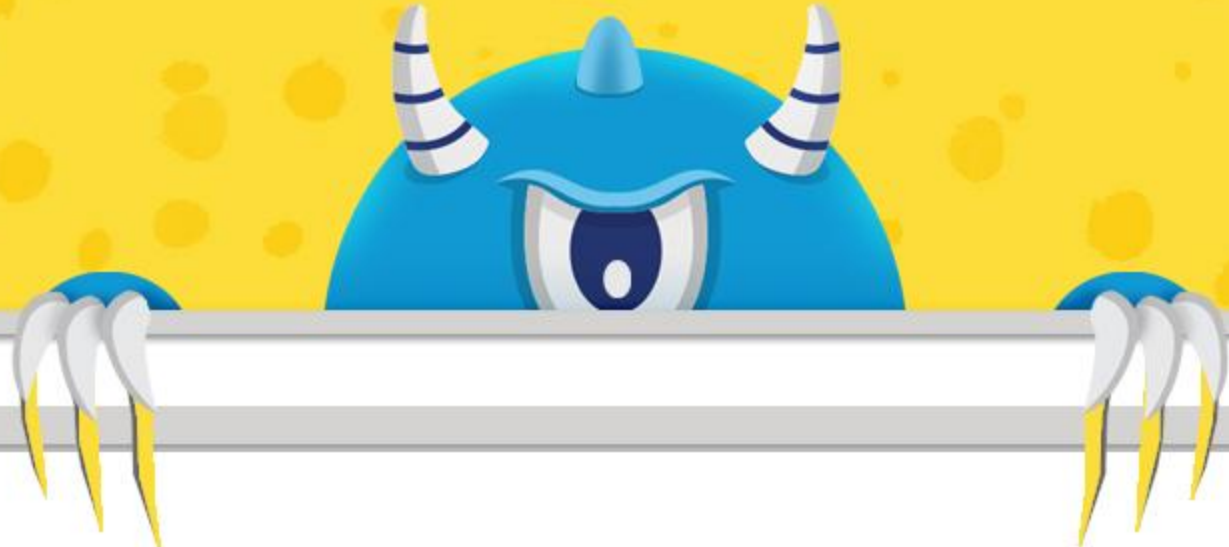
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Common Reports We Use From CallRail



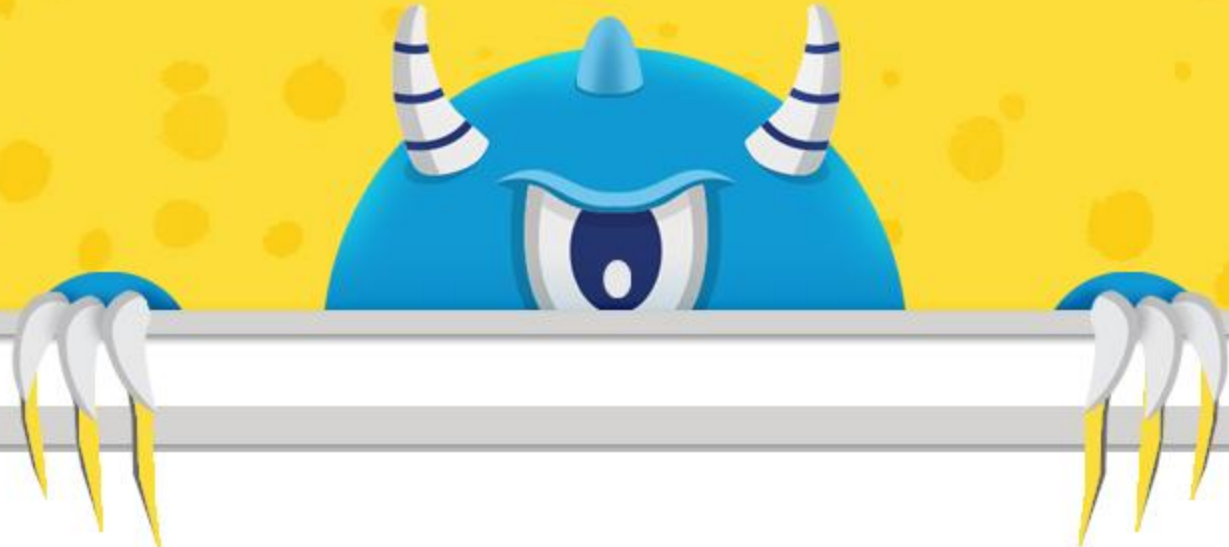
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The “Missed Call” Report



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The “Missed Call” Report



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## Getting Started

CallRail defines a **missed call** as any inbound call that is unanswered, results in an automatically detected voicemail, or is detected as abandoned. Calls received by a voicemail step in the Call Flow Builder are also considered to be missed.

A call answered by a phone system outside of CallRail is considered an **answered call**. Any call answered by a person or an automated system in which the customer didn't leave a voicemail also is considered an answered call.

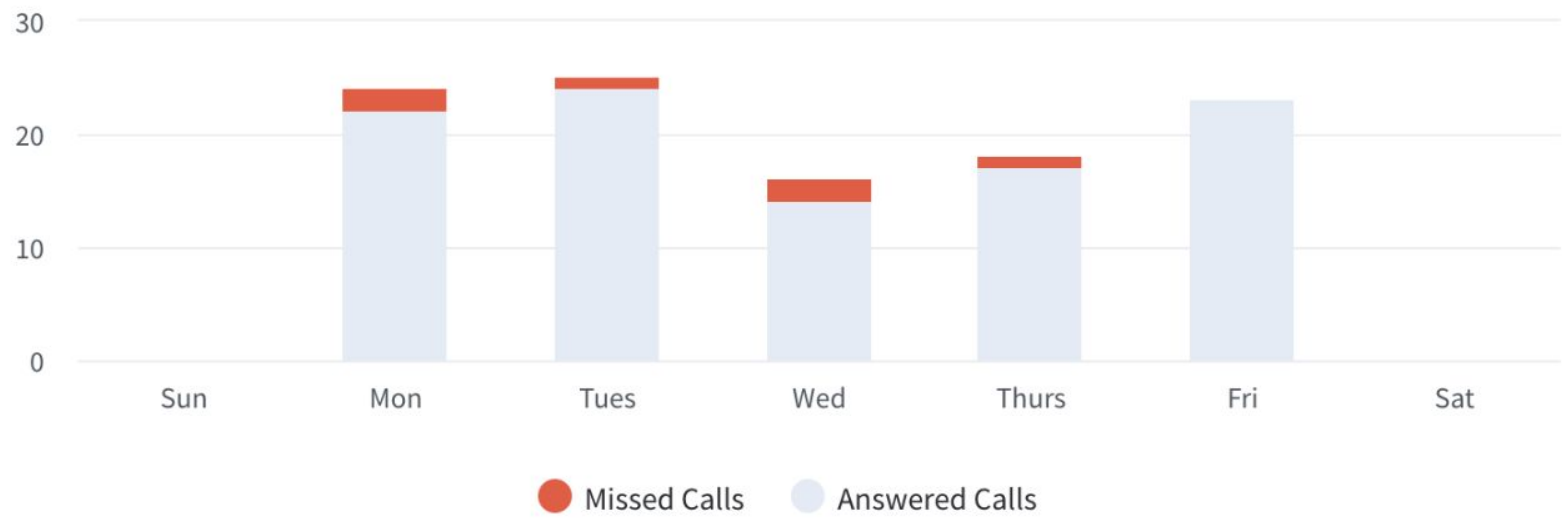


# Missed Calls

Planet Stone ▾ during This Year ▾ showing [Calls By Day of Week](#) ▾ and [+ Add Filter](#)

Missed Calls for Jan 1, 2021 - Apr 23, 2021 Eastern Time

Some Clients Have Good, Low “Missed Call” Rates



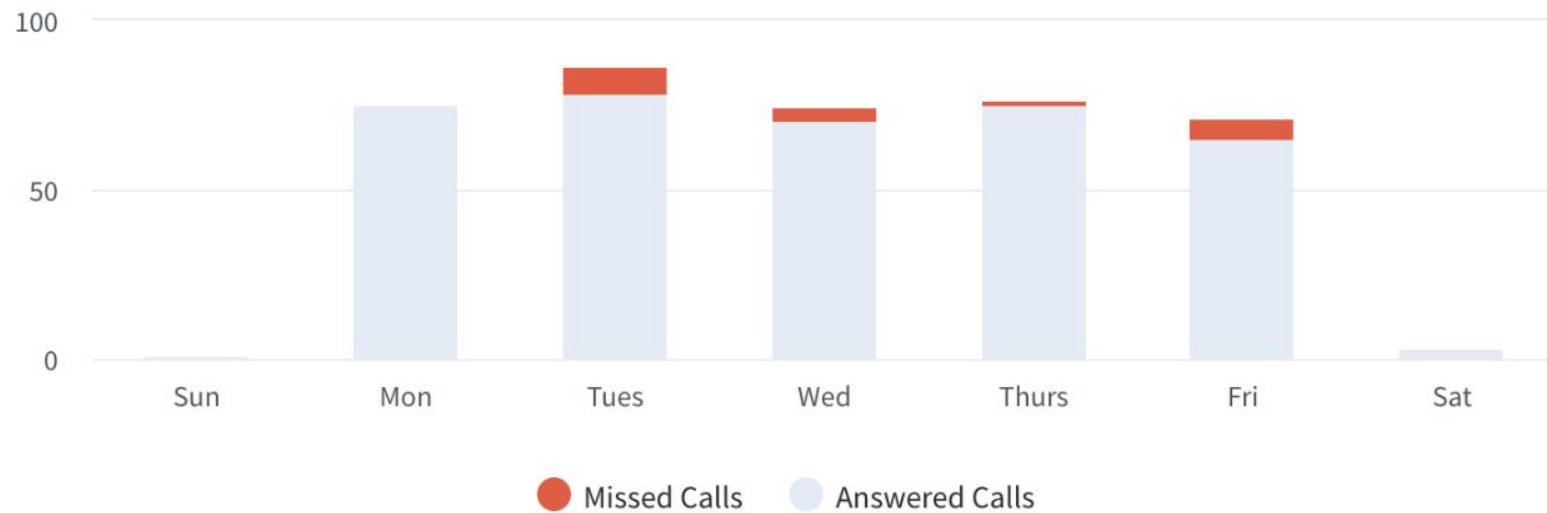




# Missed Calls

Benjamin Franklin Plumbing ▾ during This Year ▾ showing  Calls By Day of Week ▾ and [+ Add Filter](#)

Missed Calls for Jan 1, 2021 - Apr 23, 2021 Eastern Time





# Missed Calls

Elite Electric and Air

during

This Year

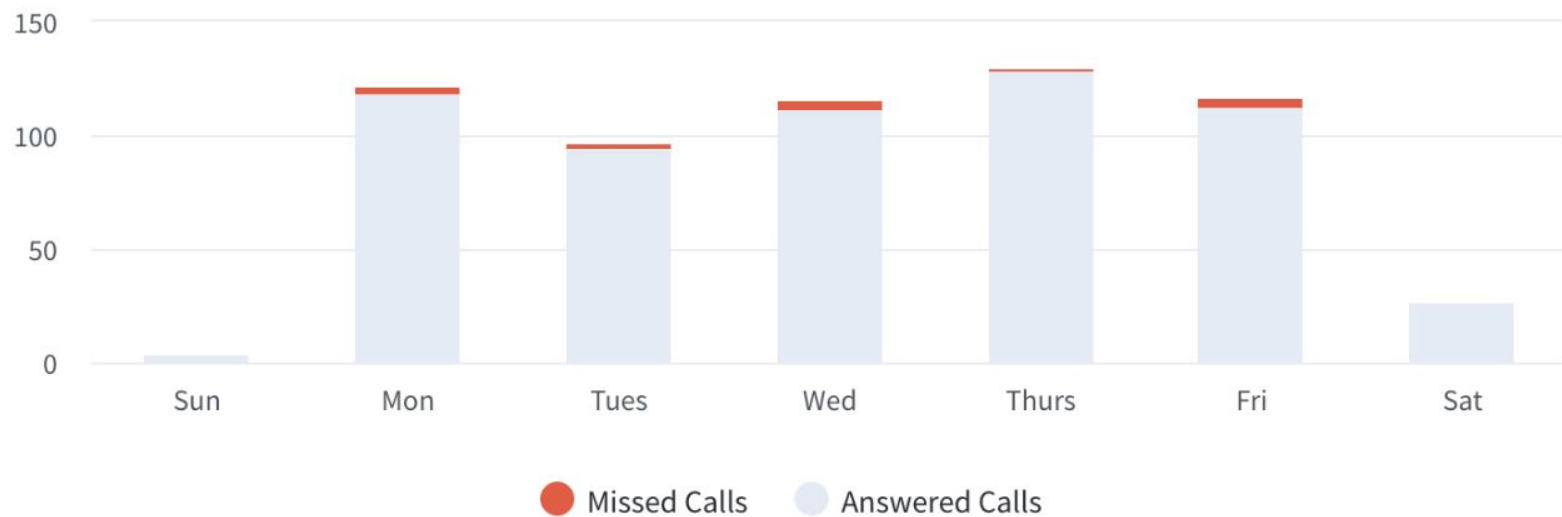
showing

Calls By Day of Week

and

+ Add Filter

## Missed Calls for Jan 1, 2021 - Apr 23, 2021 Eastern Time





# Missed Calls

Mortellaro Law ▾

during

This Year ▾

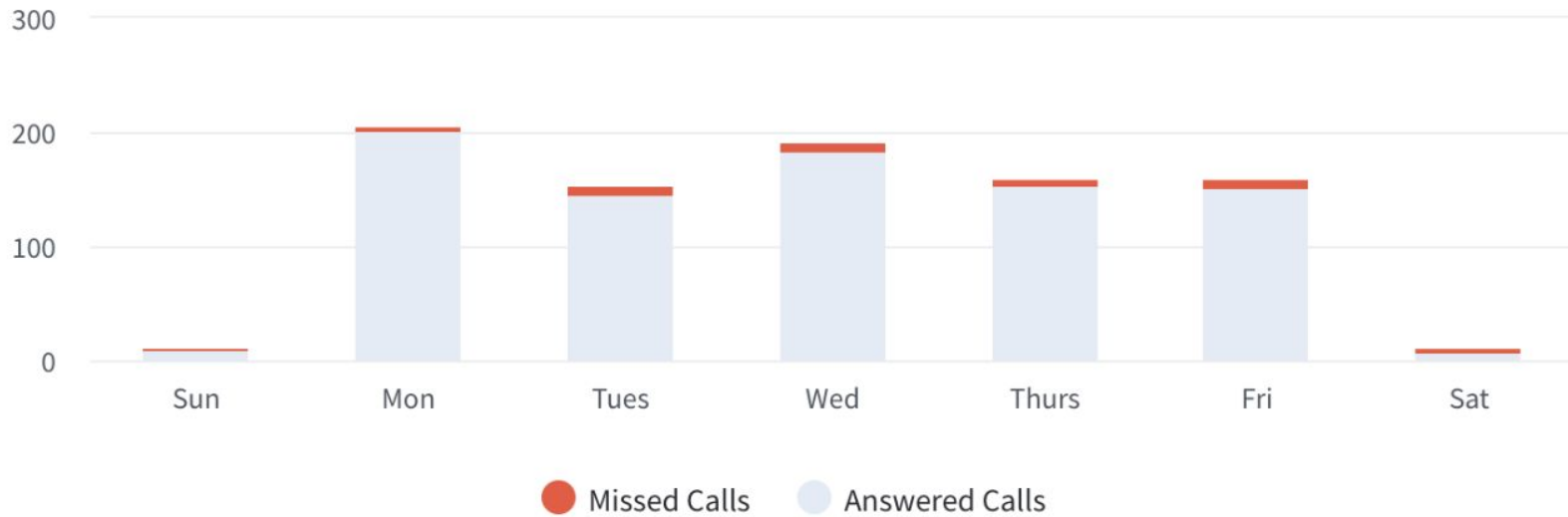
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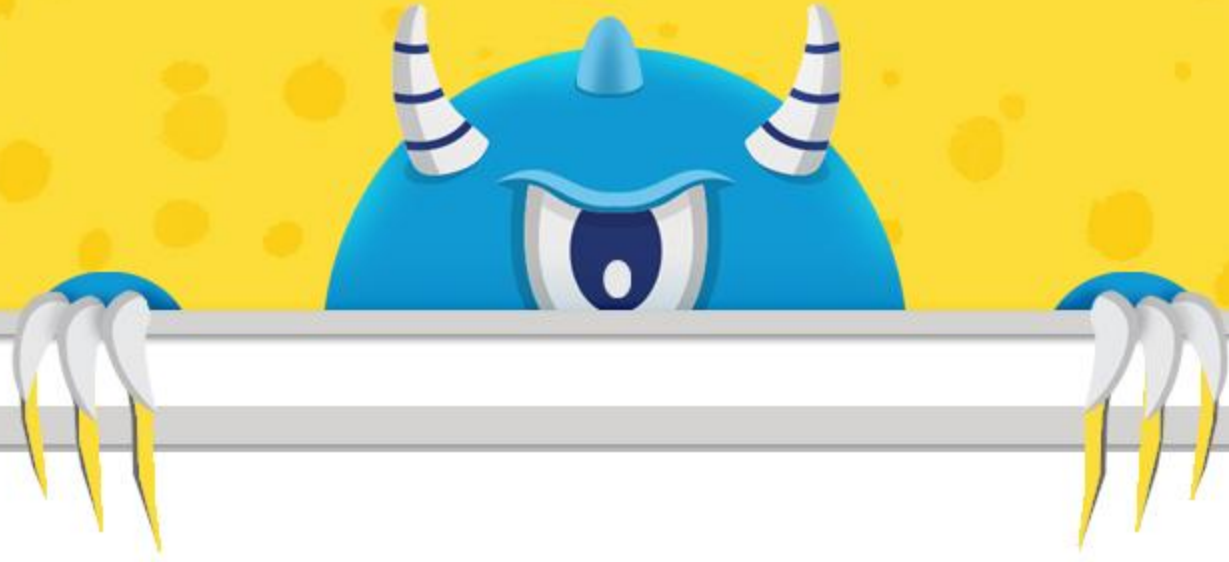
☰ Calls By Day of Week ▾

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## Missed Calls for Jan 1, 2021 - Apr 23, 2021 Eastern Time





Some Clients Continue To Struggle With Missed Calls



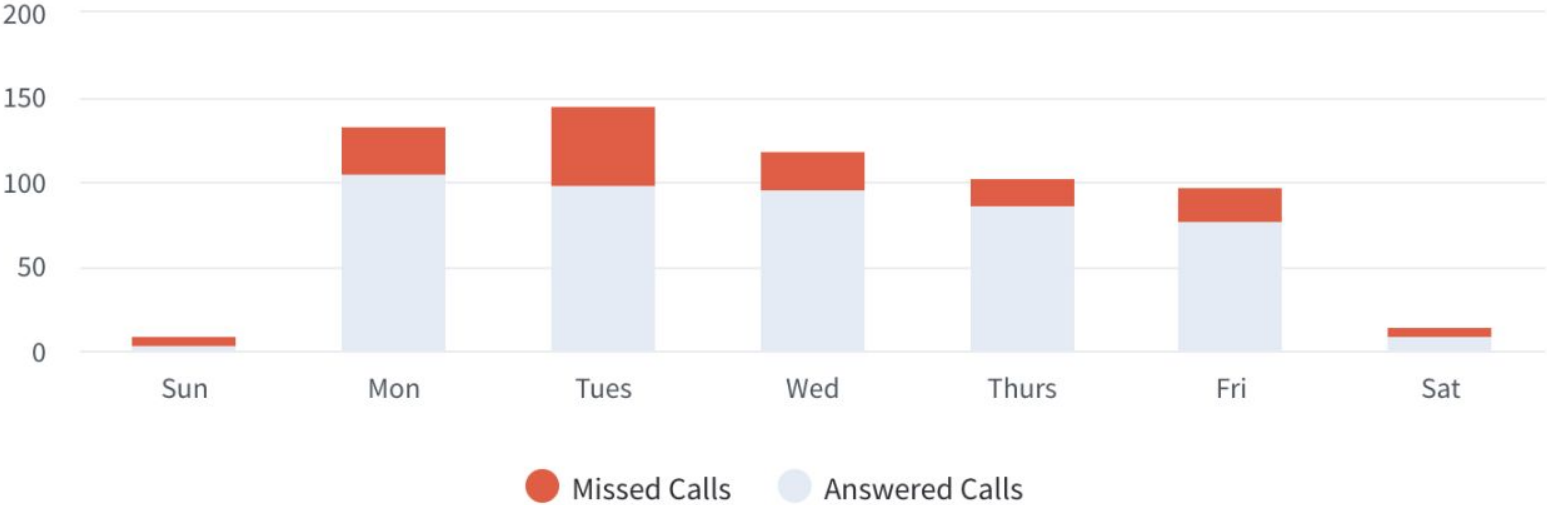
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# Missed Calls

Servicemaster By A1 ▾ during This Year ▾ showing Calls By Day of Week ▾ and + Add Filter

Missed Calls for Jan 1, 2021 - Apr 23, 2021 Eastern Time





# Missed Calls

Bath & Kitchen Gallery

during

This Year

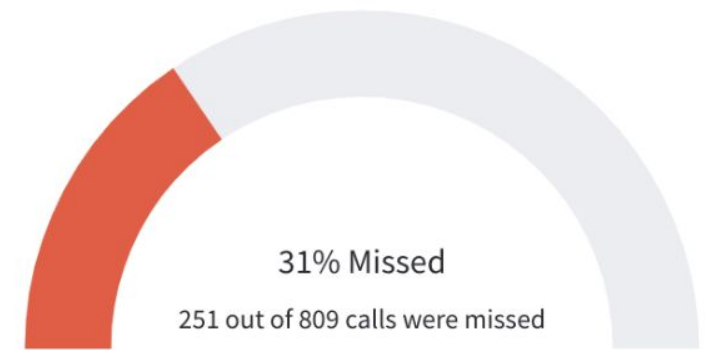
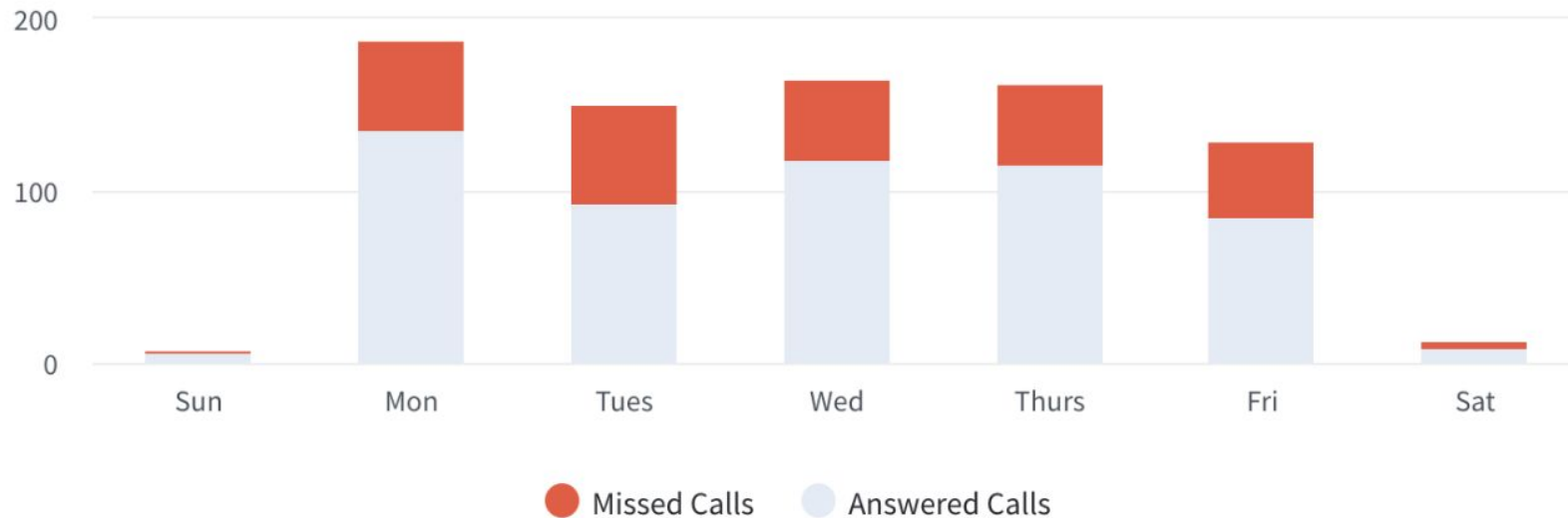
showing

Calls By Day of Week

and

+ Add Filter

## Missed Calls for Jan 1, 2021 - Apr 23, 2021 Eastern Time



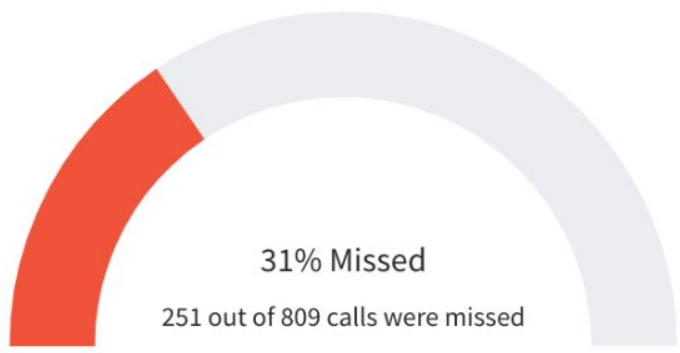
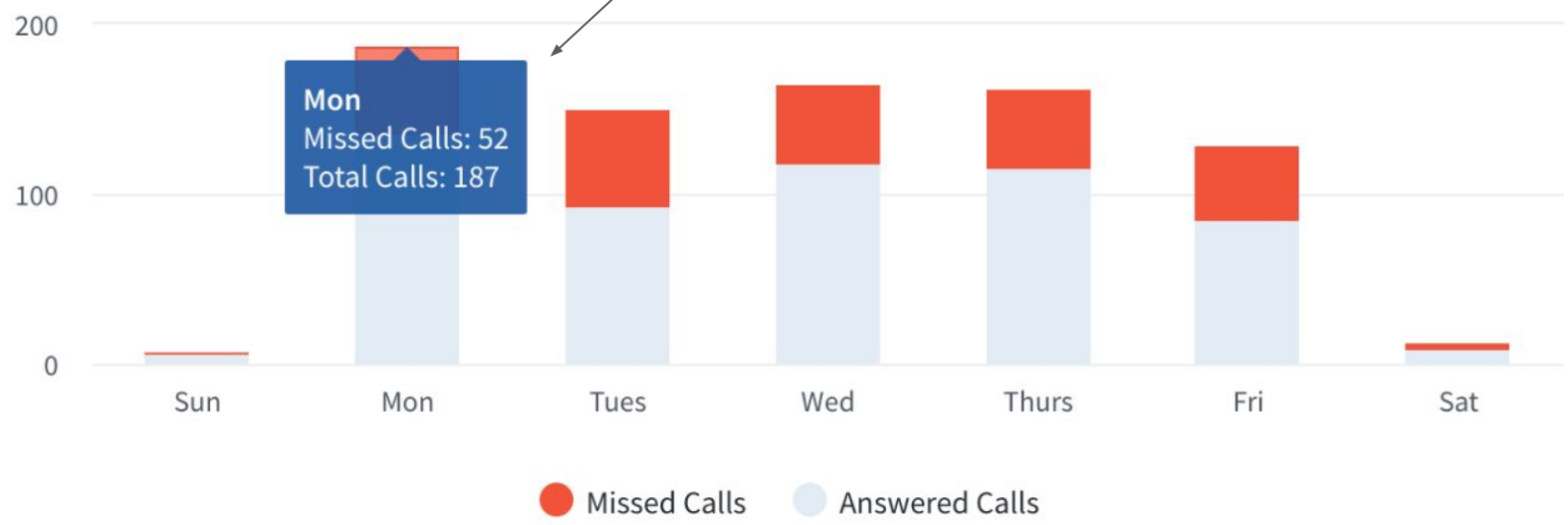


# Missed Calls

## Majority of Missed Calls On Mondays

Bath & Kitchen Gallery ▾ during This Year ▾ showing Calls By Day of Week ▾ and + Add Filter

Missed Calls for Jan 1, 2021 - Apr 23, 2021 Eastern Time

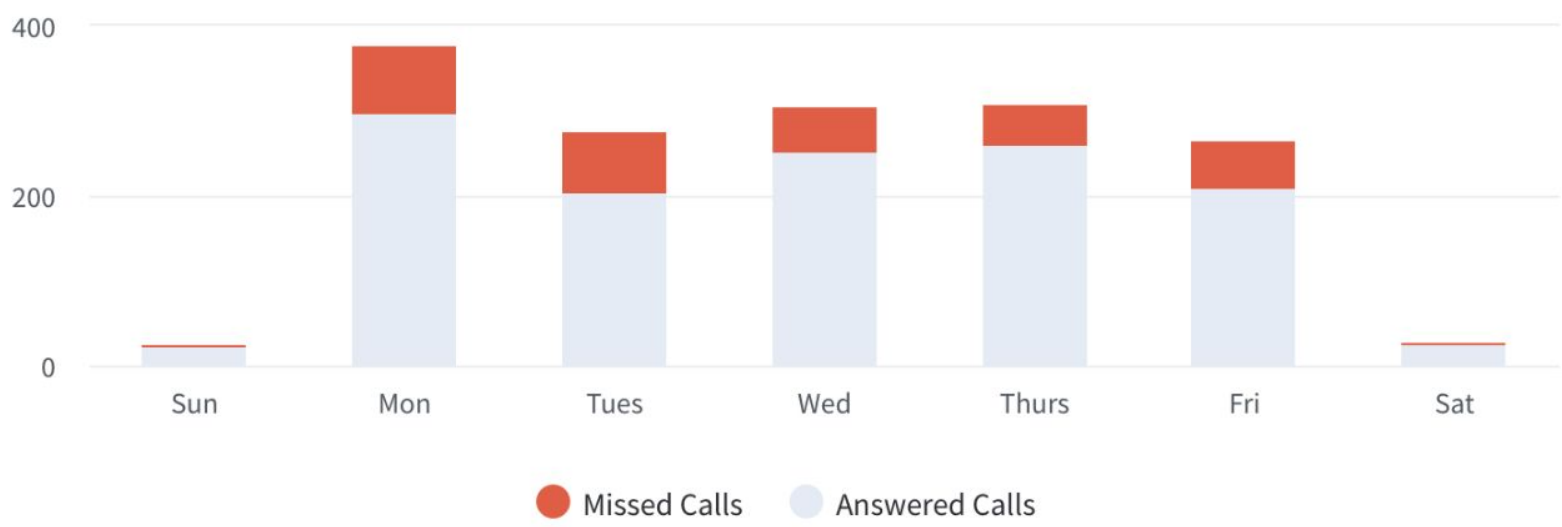




# Missed Calls

Atlantic Coast Physical Medicine ▾ during **Jan 1, 2019 - Dec 31, 2019 ▾** showing  Calls By Day of Week ▾ and

Missed Calls for Jan 1, 2019 - Dec 31, 2019 Eastern Time



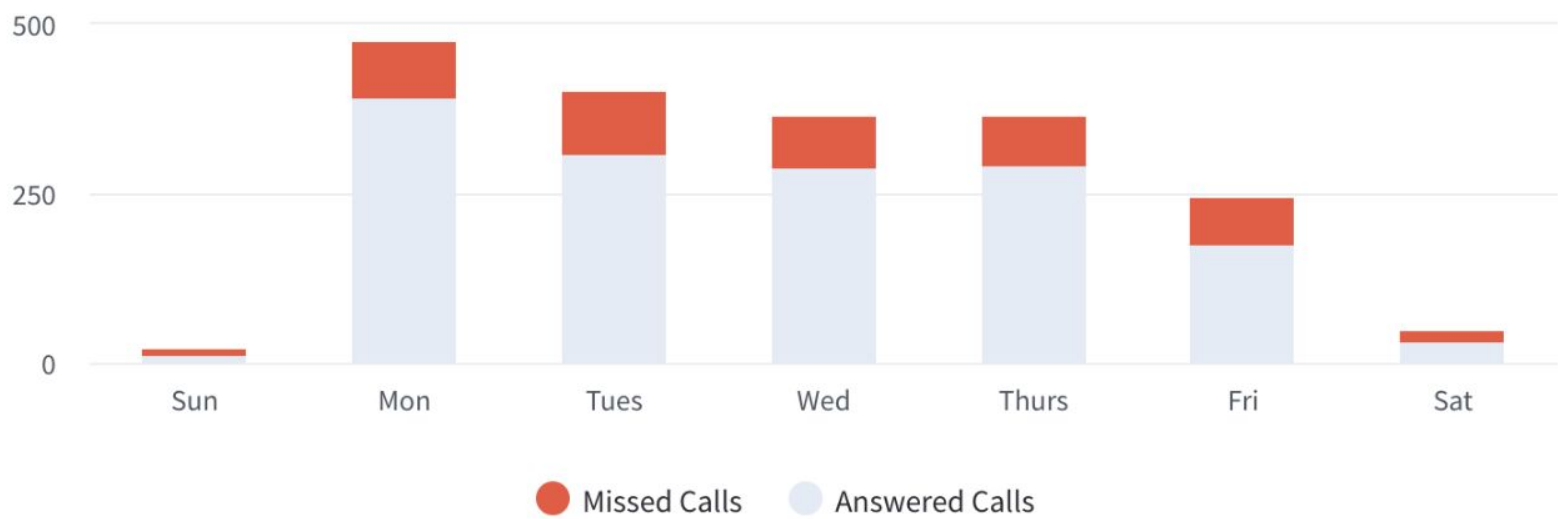




# Missed Calls

Atlantic Coast Physical Medicine ▾ during **Last Year ▾** showing  Calls By Day of Week ▾ and

Missed Calls for Jan 1, 2020 - Dec 31, 2020 Eastern Time

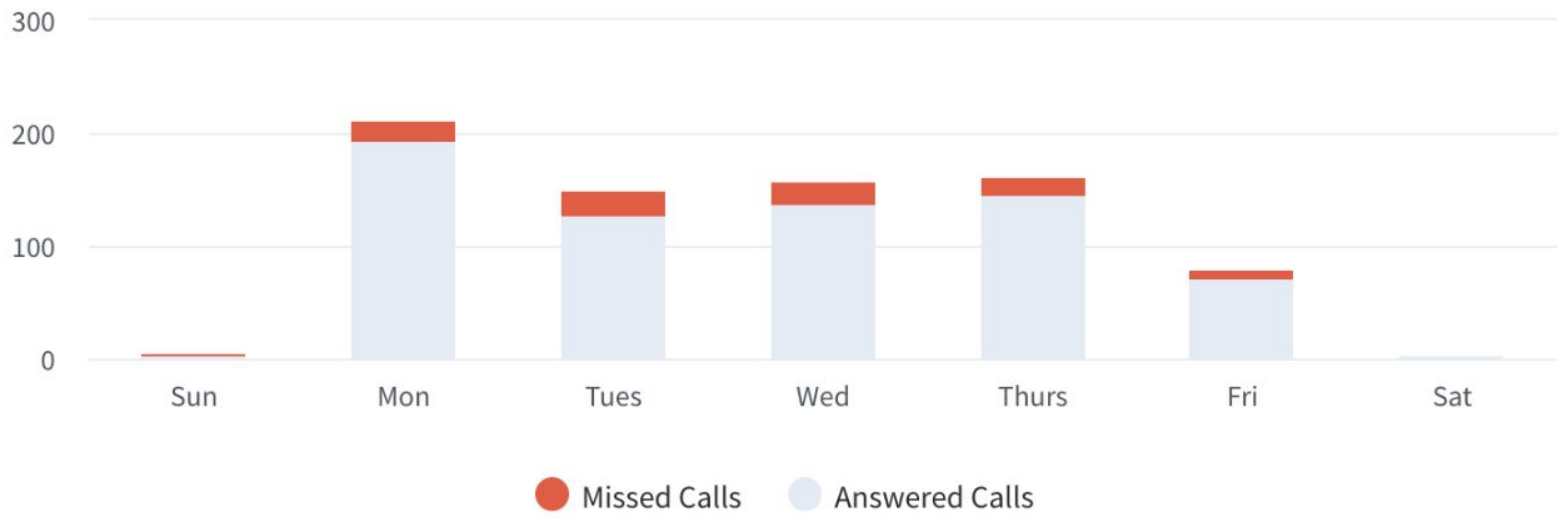




# Missed Calls

Atlantic Coast Physical Medicine ▾ during **This Year ▾** showing ☰ Calls By Day of Week ▾ and + Add Filter

Missed Calls for Jan 1, 2021 - Apr 23, 2021 Eastern Time





# Missed Calls

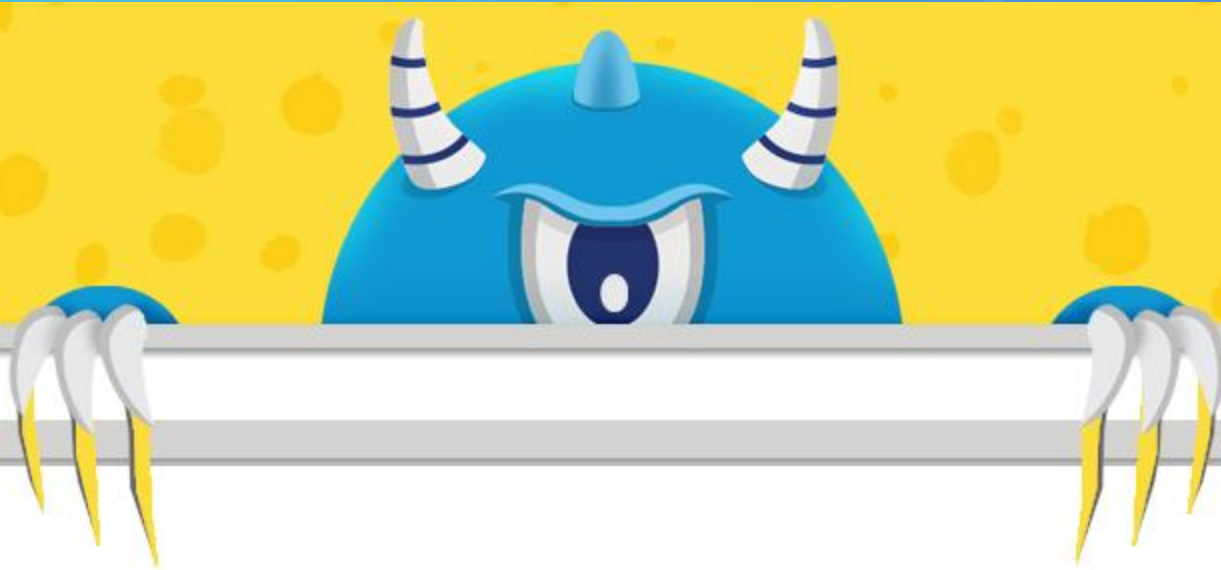
Servicemaster By A1 ▾ during Last Year ▾ showing  Calls By Hour of Day ▾ and

Missed Calls for Jan 1, 2020 - Dec 31, 2020 Eastern Time



**Find Missed Calls By The Hour**





## Call Attribution

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Hargray ▾ during This Year ▾ by Source ▾ showing Total Calls ▾ by ↻ Total ▾ and + Add Filter

Source	Total Calls ▾	First-Time Callers	Qualified Calls	Average Duration
	19,825	9,791	737	6m 5s
Google Ads	8,456	4,476	515	6m 11s
PA Non Payment	3,370	1,137	26	4m 35s
After Hours to Ibex	424	309	0	7m 28s
Atlas Order Questions	382	274	0	8m 53s
Valdosta DM	<b>Direct Mail</b> 334	183	4	8m 20s
Google Organic	302	79	5	2m 44s
Economy TV Email	<b>Email Blast</b> 283	201	0	7m 46s
Paid Search	274	13	20	5m 9s
Bing Ads	247	144	2	7m 17s
Direct	192	66	4	3m 19s
Perry Shared Mail	<b>Email Blast</b> 160	41	0	8m 38s

Leisure Depot ▾

during

Last Year ▾

showing

Total Calls ▾

by

Π Total ▾

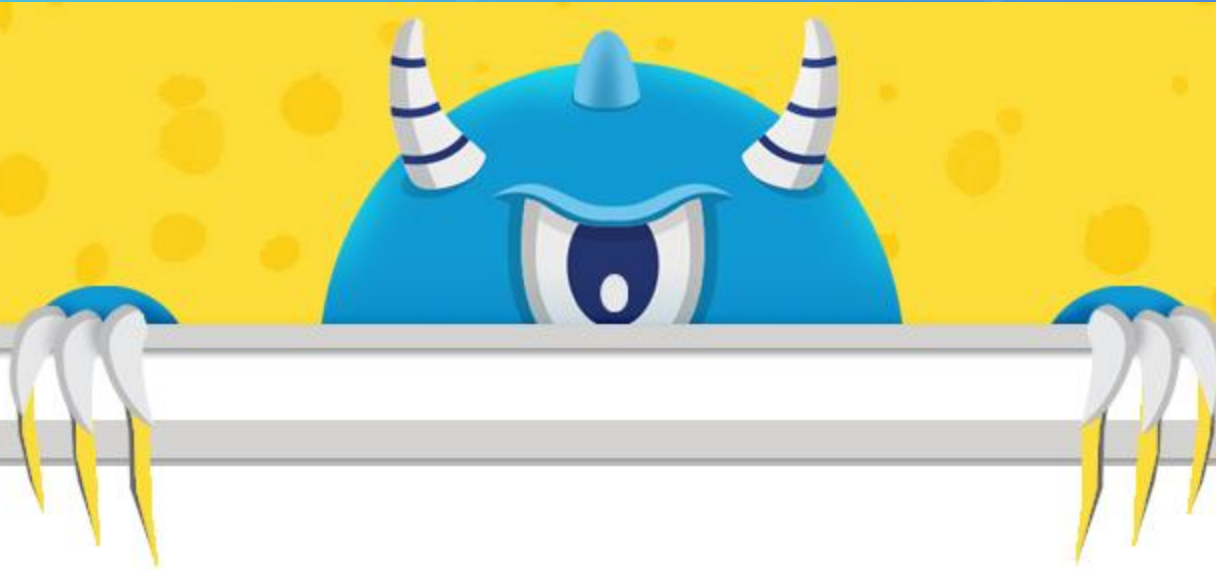
and

+ Add Filter

Edit Columns

Export ▾

Number Name	Company	Tracking Number	Destination	Total Calls ▾	Missed Calls	Qualified Calls	First-Time Callers	Returning Caller
Google My Business	Leisure Depot	843-285-6732	843-552-7272	8,241	936	7,003	3,883	4,35
Paid Search Traffic	Leisure Depot	8 Number	843-552-7272	2,010	194	1,513	1,344	66
Google Ad Extension	Leisure Depot	843-633-8607	843-552-7272	1,042	116	714	643	39
Direct Mail - Customer Appreciation Event	Leisure Depot	843-549-4479	843-552-7272	61	11	51	35	2
Eblast - MMG	Leisure Depot	843-890-0922	843-552-7272	21	3	19	10	1
Shop Calls – Maggie's Phone	Leisure Depot	843-865-2040	703-217-5288	9	0	1	3	
Eblast - Adams	Leisure Depot	843-584-8443	843-552-7272	4	2	0	3	



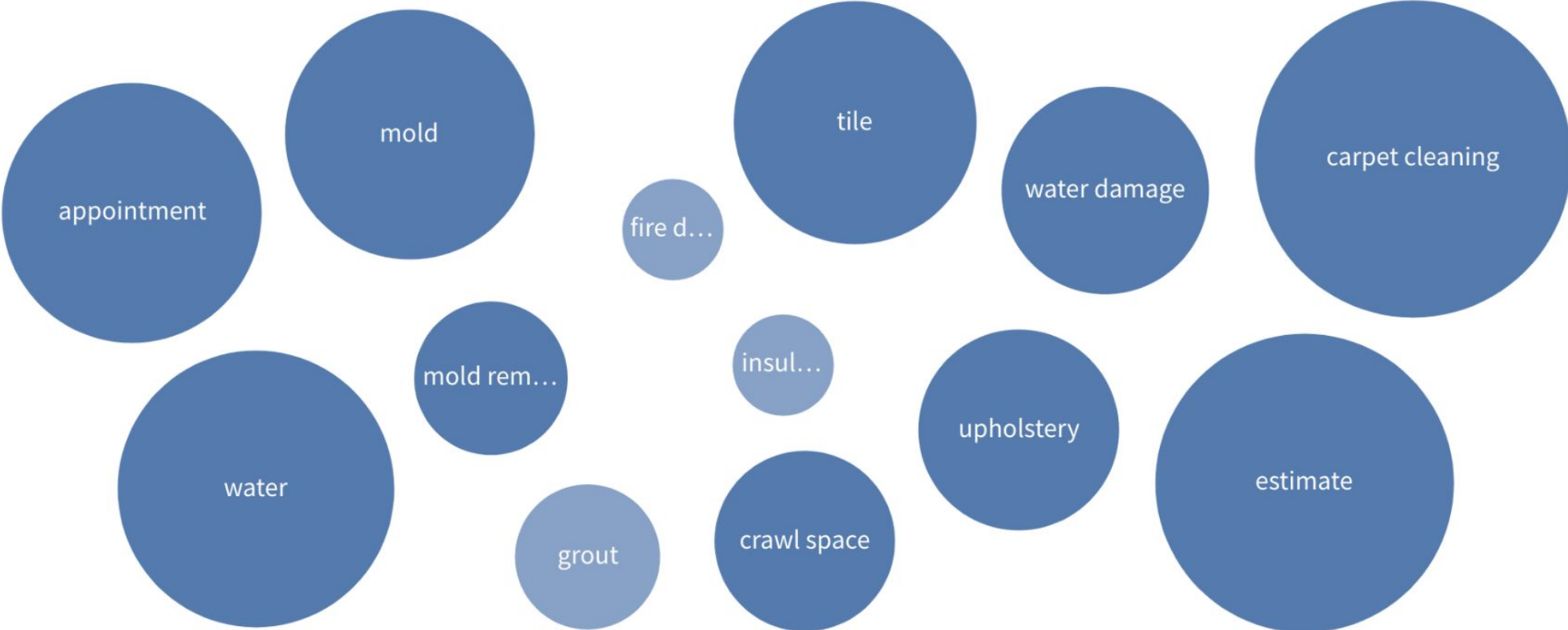
## Reporting: Key Terms Spotted

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# Key Terms Spotted


Servicemaster By A1 ▾ during Last Year ▾ spoken by Any Speaker ▾ showing Total Calls ▾ by  Total ▾ and [+ Add Filter](#)

Total Calls for Jan 1, 2020 - Dec 31, 2020 Eastern Time

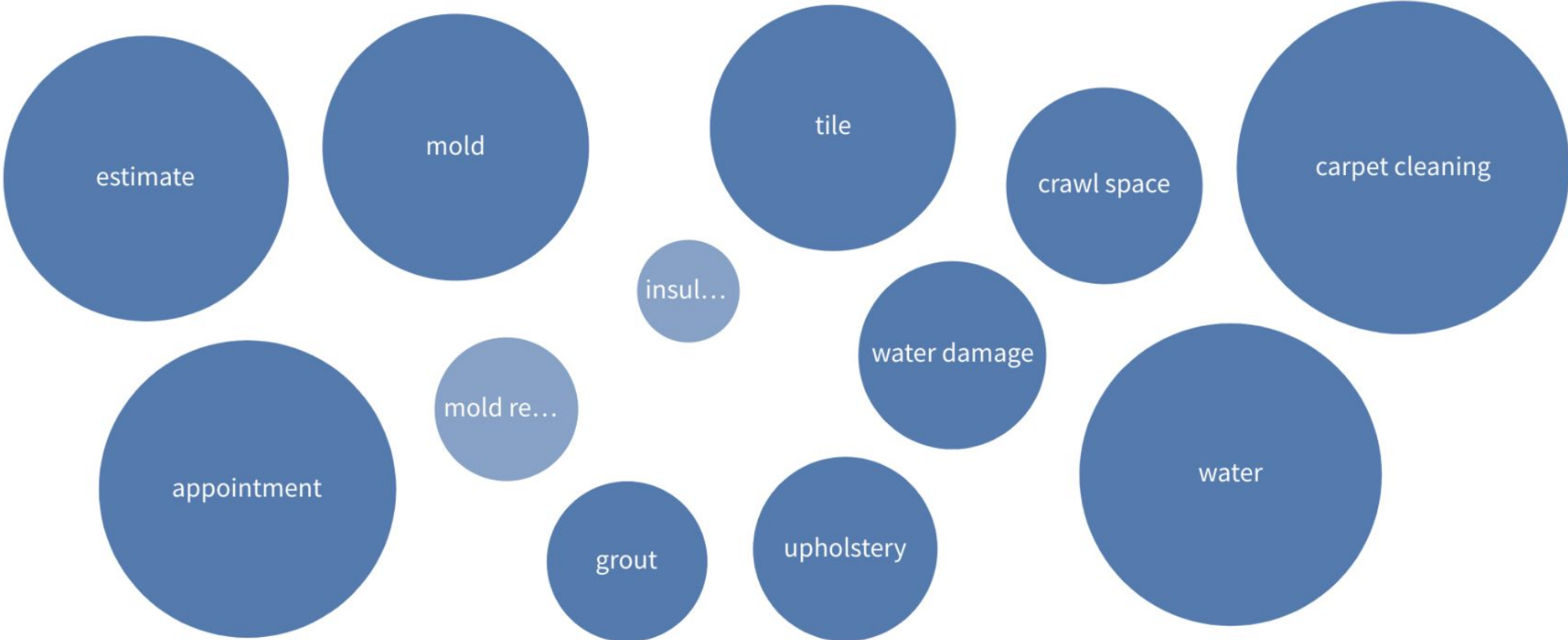


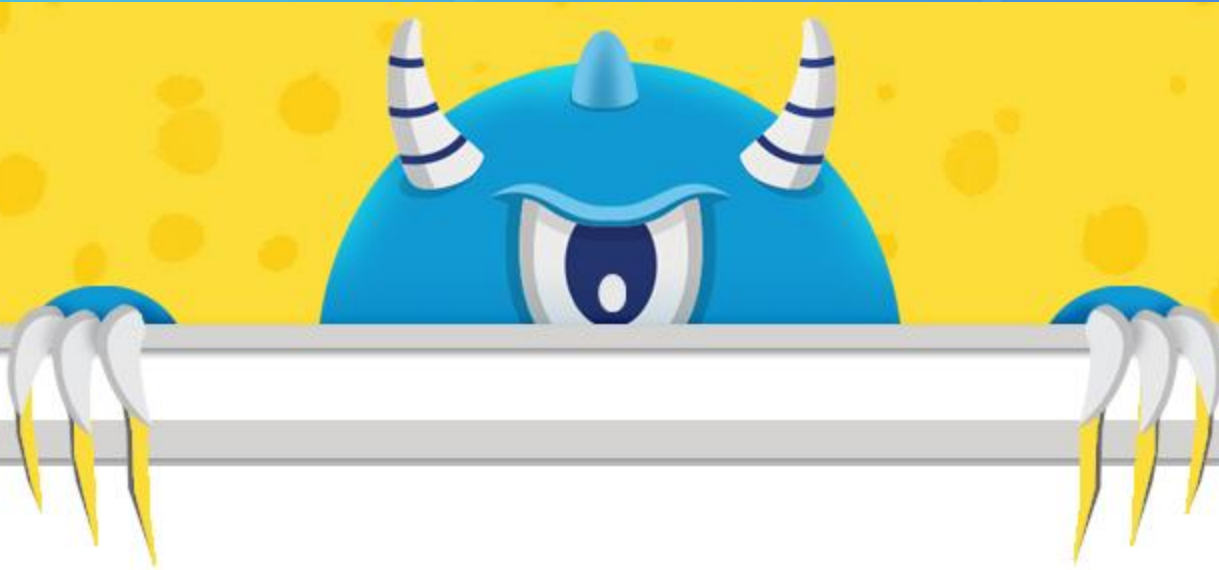


# Key Terms Spotted

Servicemaster By A1 ▾ during Last Year ▾ spoken by **Customer ▾** showing Total Calls ▾ by  Total ▾ and [+ Add Filter](#)

Total Calls for Jan 1, 2020 - Dec 31, 2020 Eastern Time





## Form Attribution

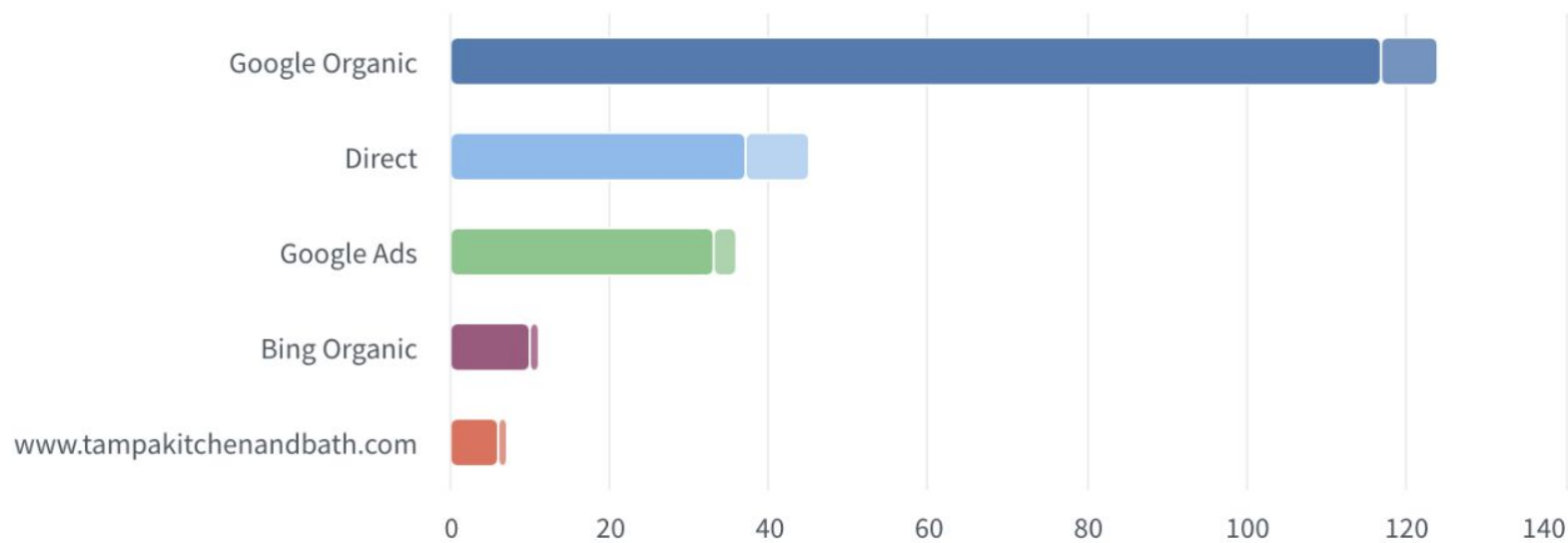
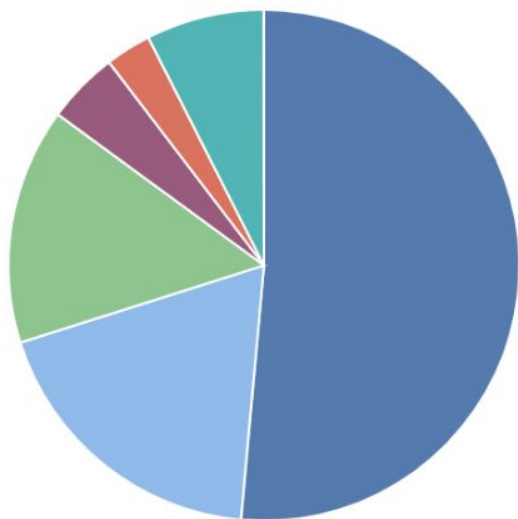
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# Form Attribution

Bath & Kitchen Gallery ▾ during Last Year ▾ by Source ▾ showing Total Form Submissions ▾ by Total ▾ and + Add Filter

## Form Submissions for Jan 1, 2020 - Dec 31, 2020 Eastern Time



Source	Total Form Submissions ▼	First-Time Submissions
Google Organic	522	463
Direct	181	167
Google Ads	139	120
Bing Organic	81	50
Yahoo Organic	28	23
pinterest	17	17
Pinterest	9	9
Google My Business	7	7
MMG.Facebook	7	7
shopleisuredepot.com	7	7
www.pinterest.com	4	4
duckduckgo.com	3	3
MMG.Email	3	3

Leisure Depot ▾

during

Last Year ▾

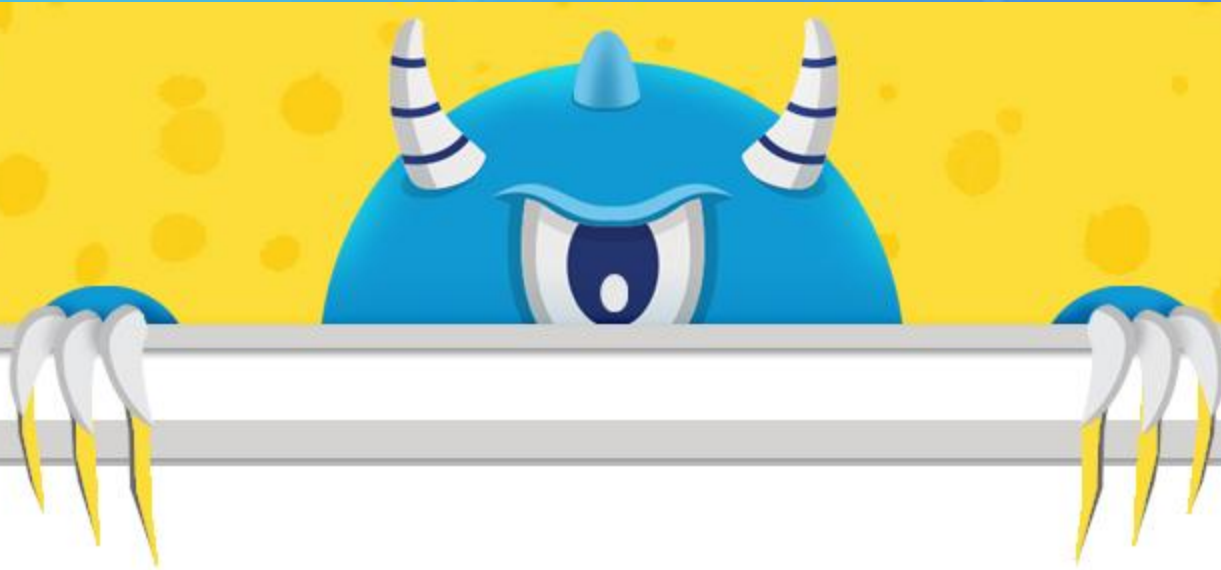
by

🔗 Weeks ▾

and

+ Add Filter

Company	Submission Time	Form Name	Contact	Source ▲	Referrer
<a href="#">Leisure Depot</a>	May 1, 2020 11:40am	External Form <a href="https://shopleisured...">https://shopleisured...</a>	Unavailable ● noah2007family@icloud.com	Google Ads	<a href="https://www.google.co">https://www.google.co</a>
<a href="#">Leisure Depot</a>	May 2, 2020 11:03am	External Form <a href="https://shopleisured...">https://shopleisured...</a>	Unavailable ● mablessin725@gmail.com	Google Ads	<a href="https://www.google.co">https://www.google.co</a>
<a href="#">Leisure Depot</a>	May 2, 2020 12:43pm	External Form <a href="https://shopleisured...">https://shopleisured...</a>	Unavailable ● mcmanusheidi@gmail.com	Google Ads	<a href="https://www.google.co">https://www.google.co</a>
<a href="#">Leisure Depot</a>	May 2, 2020 2:45pm	External Form <a href="https://shopleisured...">https://shopleisured...</a>	Unavailable ● garland.blevins@gmail.com	Google Ads	direct
<a href="#">Leisure Depot</a>	May 3, 2020 4:57pm	External Form <a href="https://shopleisured...">https://shopleisured...</a>	William Sullivan 203-639-7790 theresarjs1286@gmail.com	Google Ads	<a href="https://www.google.co">https://www.google.co</a>
<a href="#">Leisure Depot</a>	May 6, 2020 7:46pm	External Form	Unavailable ● jblair1000@gmail.com	Google Ads	<a href="https://www.google.co">https://www.google.co</a>



**Discover What Keywords Led To Form Submissions**

**THE  
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Leisure Depot ▾

during

Last Year ▾

by

Weeks ▾

and

+ Add Filter

### Keywords

+above +ground +pools

patio sale

cheap patio sets for sale

outdoor furnishings

hot tub tub

### Campaign

Above Ground Pools | CHS Market | 24/7

Outdoor Furniture | CHS | 24/7

Outdoor Furniture | North Area | 24/7

Outdoor Furniture | North Area | 24/7

Hot Tubs | North | 24/7

### Landing Page

shopleisuredepot.com/collections/above-ground-swimming-...

shopleisuredepot.com/collections/casual-outdoor-furniture

shopleisuredepot.com/collections/casual-outdoor-furniture


shopleisuredepot.com/collections/casual-outdoor-furniture

shopleisuredepot.com/collections/casual-outdoor-furniture

shopleisuredepot.com/collections/spas-hot-tubs



## First Touch and Lead Creation Milestones

Source: Google Ads  
Campaign: Hot Tubs | North | 24/7  
Medium: MMG.PPC  
Keywords: hot tub tub  
Device / Browser:  Safari

### UTM Variables

utm\_source: MMG.Hot Tubs  
utm\_medium: MMG.PPC  
utm\_campaign: Hot Tubs

### Landing Page URL Variables

utm\_source: MMG.Hot Tubs  
utm\_medium: MMG.PPC  
utm\_campaign: Hot Tubs  
gclid: CjwKCAjwwMn1BRAUEiwAZ\_jnEnBVvcuqONioeB\_FZk5pJH8dWaamk5fWcUPkOSqOT7u6vAkiQ09rARoCxmQQAuD\_BwE

### Full URLs

Referrer: <https://www.google.com/>  
Landing Page: [https://shopleisuredepot.com/collections/spas-hot-tubs?utm\\_source=MMG.Hot%20Tubs&utm\\_medium=MMG.PPC&utm\\_campaign=Hot%20Tubs&gclid=CjwKCAjwwMn1BRAUEiwAZ\\_jnEnBVvcuqONioeB\\_FZk5pJH8dWaamk5fWcUPkOSqOT7u6vAkiQ09rARoCxmQQAuD\\_BwE](https://shopleisuredepot.com/collections/spas-hot-tubs?utm_source=MMG.Hot%20Tubs&utm_medium=MMG.PPC&utm_campaign=Hot%20Tubs&gclid=CjwKCAjwwMn1BRAUEiwAZ_jnEnBVvcuqONioeB_FZk5pJH8dWaamk5fWcUPkOSqOT7u6vAkiQ09rARoCxmQQAuD_BwE)

**Discover Customers  
Discovery and Journey**

**MediaBeast  
Campaign  
URL  
Tracking**







jblair1000@gmail.com

Total Interactions: 1

Initial Source: Google Ads"hot tub tub"

May 6, '20  
7:46 PM

### Form Submission

Completed: 3 of 3 fields completed

Form URL: [https://shopleisuredepot.com/collections/spas-hot-tubs?utm\\_source=MMG.Hot%20Tubs&utm\\_medium=MMG.PPC&utm\\_campaign=Hot%20Tubs&gclid=CjwKCAjwwMn1BRAUEiwAZ\\_jnEnBVvcuqONioeB\\_FZk5pJH8dWaamk5fWcUPkOSqOT7u6vAkiQ09rARoCxmQQAvD\\_BwE](https://shopleisuredepot.com/collections/spas-hot-tubs?utm_source=MMG.Hot%20Tubs&utm_medium=MMG.PPC&utm_campaign=Hot%20Tubs&gclid=CjwKCAjwwMn1BRAUEiwAZ_jnEnBVvcuqONioeB_FZk5pJH8dWaamk5fWcUPkOSqOT7u6vAkiQ09rARoCxmQQAvD_BwE)

Qualified:

Tags: +

Value: +

Notes: +

### Form Contents

Email@example.com	jblair1000@gmail.com	
Form Type	customer	
Contact Tags	newsletter	

7:45 PM

### First Touch and Lead Creation Milestones

Source	Google Ads
Campaign	Hot Tubs   North   24/7
Medium	MMG.PPC
Keywords	hot tub tub
Device / Browser	Safari

### UTM Variables


A blue cartoon monster with horns and claws is peeking over the top of a browser window. The monster has a large eye and a small horn on its forehead. Its claws are white with yellow tips. The browser window has a grey title bar with red, yellow, and green window control buttons on the left, a search bar, and refresh, download, and share icons on the right. The background is yellow with a pattern of small yellow circles.

## Call Recording Notes from MediaBeast

THE  
**MEDIA**BEAST

Tracking Number: **Google Ads**

Duration: **5m 2s**

Qualified:  

Tags: +

Value: +


Notes: 

Robert Wilson - toilet is clogged - 406 McCants Drive, 29464 - NK



**Read /  
Discover  
Important  
Notes From  
Our Team  
From Calls**

12:07 PM • **First Touch and Lead Creation Milestones**

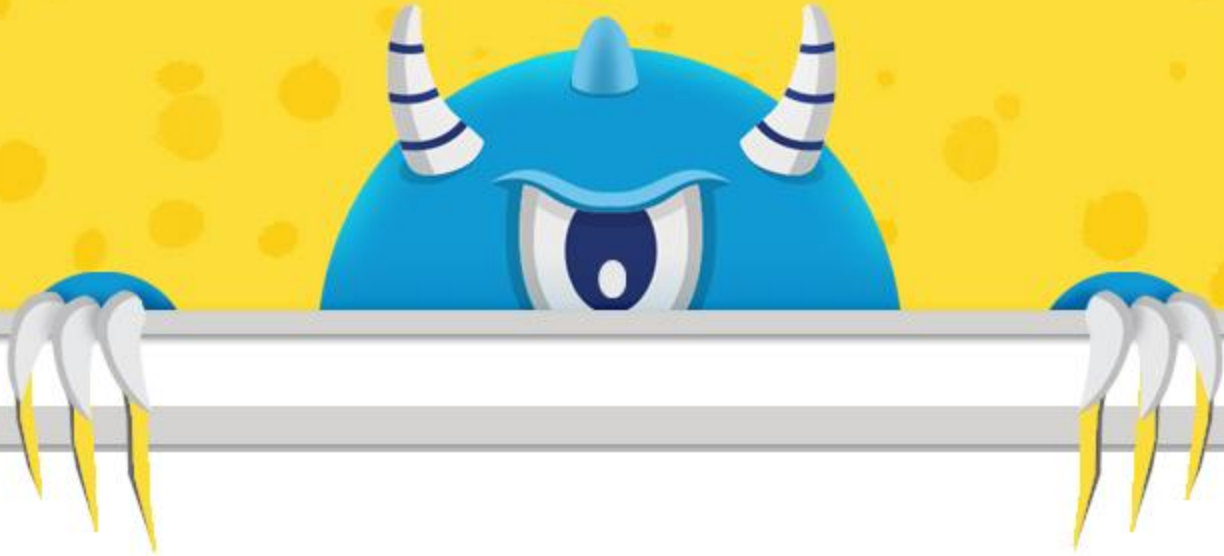
Source	Google Ads
Campaign	Local Plumbing #2
Medium	CPC
Keywords	+mount +pleasant +plumber
Device / Browser	 Safari

**Landing Page URL Variables**

gclid EAlaIQobChMI5cSB5Mzp7QIVmEWGCh38QgPOEAAAYASAAEgI6avD\_BwE

**Full URLs**

Referrer	https://www.google.com
Landing Page	https://www.benjaminfranklinplumbing.com/charleston/?gclid=EAlaIQobChMI5cSB5Mzp7QIVmEWGCh38QgPOEAAAYASAAEgI6avD_BwE



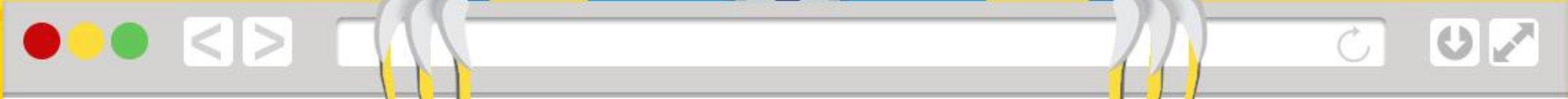
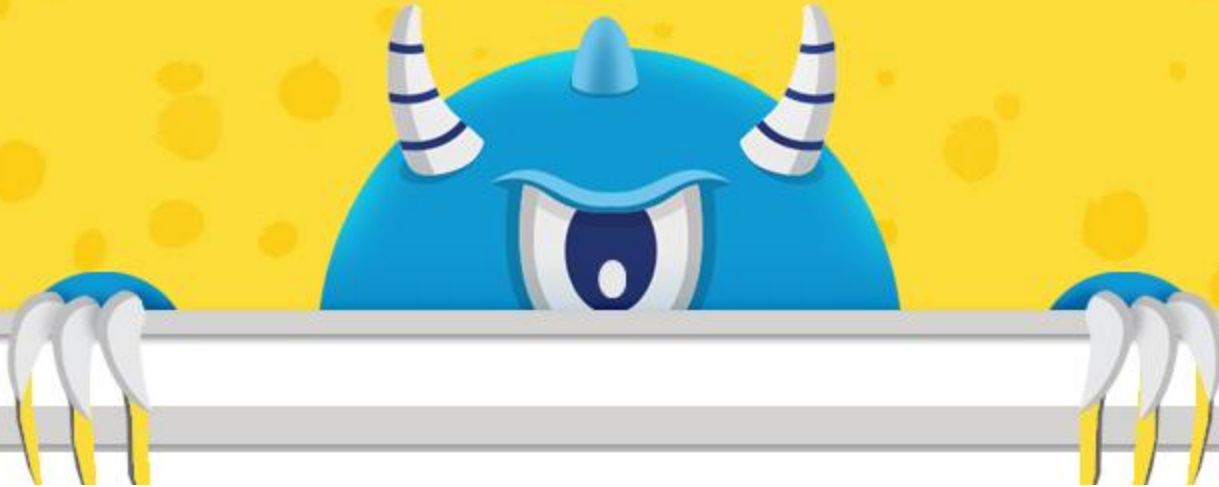
Benjamin Franklin Plumbing

Google Ads  
843-548-3405

Tom Robinson - toilet is leaking every time it flushes. 1194 Quick Rabbit Loop, 29414. Scheduled - NK



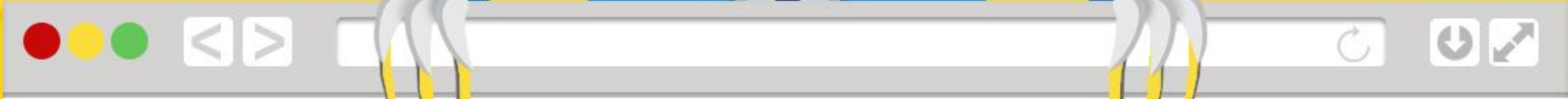
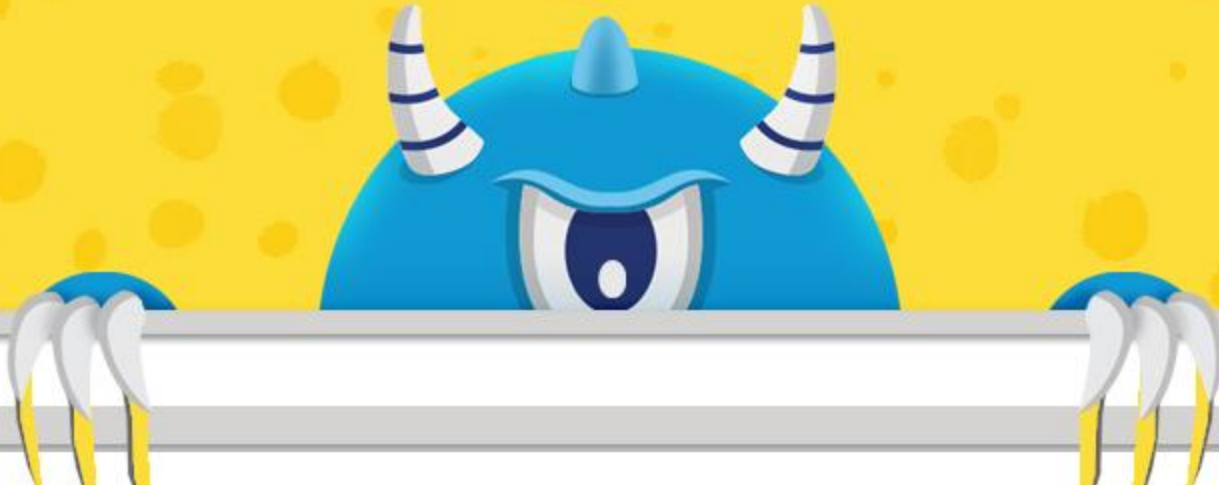
THE  
MEDIABEAST



Benjamin Franklin Plumbing Google Ads Tom Robinson - toilet is leaking every time it flushes. 1194 Quick Rabbit Loop, 29414. Scheduled - NK 843-548-3405

Benjamin Franklin Plumbing Google Ad Extension Google Ads Dec 24, 2020 10:43am 37s Linda 843-81 they could not hear her. Kim hung up - NK 843-588-1717

THE  
MEDIABEAST



	Benjamin Franklin Plumbing 843-548-3405	Google Ads	Tom Robinson - toilet is leaking every time it flushes. 1194 Quick Rabbit Loop, 29414. Scheduled - NK				
	Benjamin Franklin Plumbing 843-588-1717	Google Ad Extension	Google Ads	Dec 24, 2020 10:43am	37s	Linda 843-81 they could not hear her. Kim hung up - NK	
	Benjamin Franklin Plumbing 843-588-1717	Google Ad Extension	Google Ads	Dec 24, 2020 10:43am		again they could not hear her, she did not call back a thrid time - NK	

**THE  
MEDIABEAST**

Sep 28, '20  
12:36 PM

## Inbound Recorded Call



● Agent: 51 %

● Customer: 49 %



00:00

[Download MP3](#)



**Speed up your workflow**

Start using [Automation Rules](#)



Tracking Number: **Google Ads**

Duration: **3m 0s**

Qualified:  

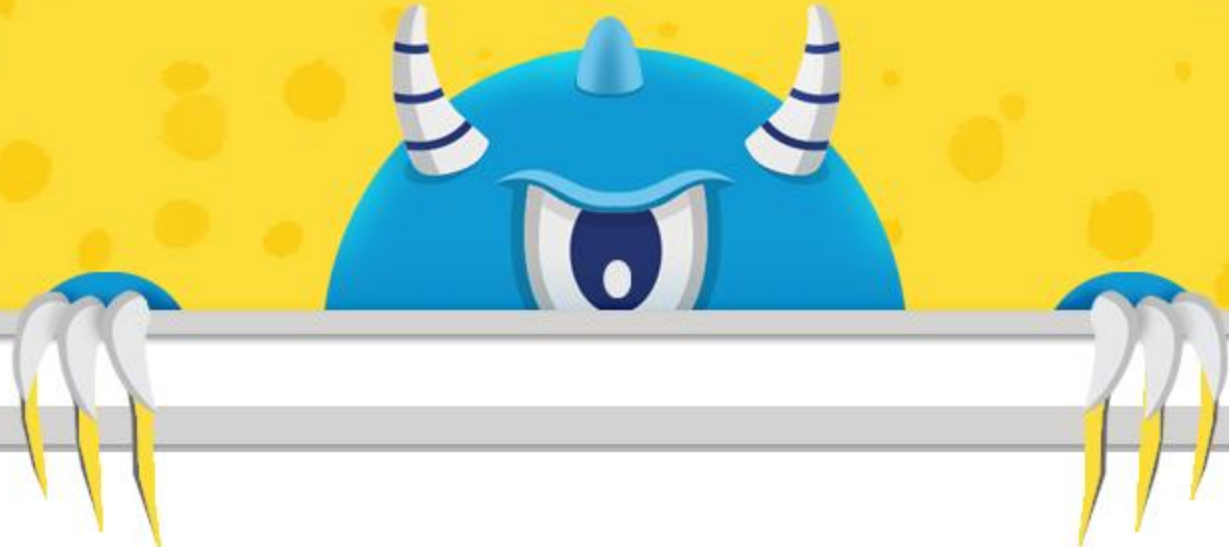
Tags: **learning opportunity** × +

Value: +

Notes: 

surprised if they called someone else. - NK

Atlas - having sink and dishwasher issue - w/ Matt Oneil Real Estate. Asking how soon, Kim Said Friday was the soonest she could do it. Kim said he was not in the system so she could not help him, and he seemed very confused. (This seems flawed to me - Kim said she cant help him, but then proceeds to say she can, but would have to charge before the job is completed..so you can help him). Then she says that the home owner will have to call and give his credit card info.. so saying anything at all the agent was pointless and I would not be surprised if they called someone else. - NK



CallRail

THE  
MEDIABEAST