



**A MARKETER'S GUIDE
TO CALL TRACKING &
CONVERSATION INTELLIGENCE**

Call Tracking Guide

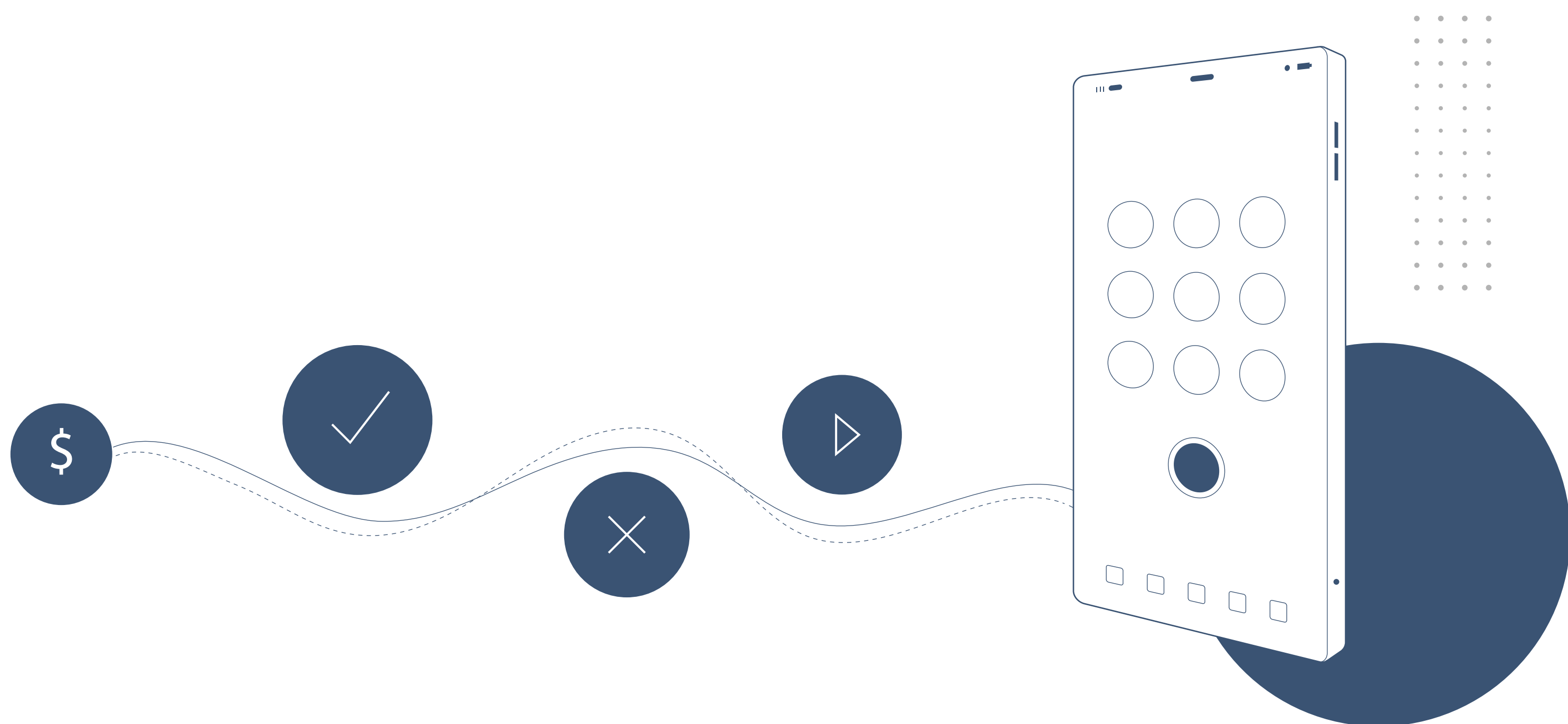
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Introducing Call Tracking



Read this comprehensive guide to understand the guiding principles and concepts of conversation intelligence, call tracking, and call analytics.

You'll walk away with a hands-on perspective of how call tracking and intelligence platforms work, what tools and tactics marketers use to boost their call campaign ROIs, and how to customize a call intelligence platform that works for your business.



Embrace the Power of Phone Calls

Marketers across all industries are ready to make a post-pandemic comeback.

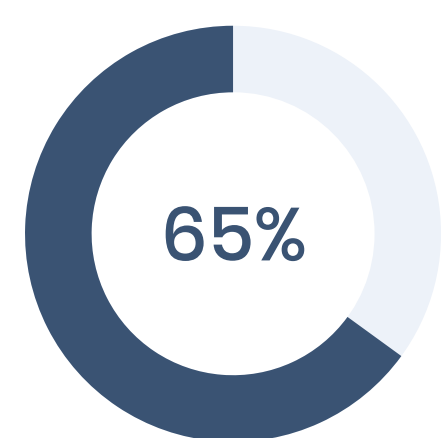
Consumer interest is increasing, and most people take to their phones when deciding to buy products or new services.

And with nearly **60% of marketers** saying that consumer-initiated inbound calls result in 30% quicker conversions, there is an urgent need for businesses to adopt consumer-centric call intelligence and tracking systems to help their campaigns.

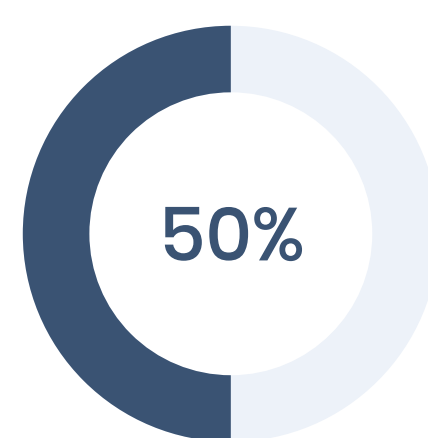
To that end, click-to-call technology has enabled consumers to get in touch with companies instantly. And in a perfect world, a click-to-call feature on your website, or in your Google Ads, will free callers of the burden of waiting on hold to talk to a representative.

But what if it doesn't? How would a poorly-constructed call system affect your brand's reputation with clients?

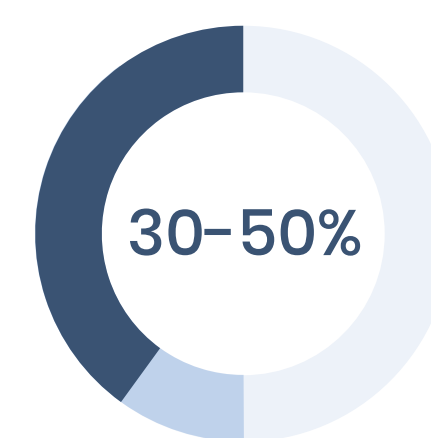
Here are some statistics to set the scene:



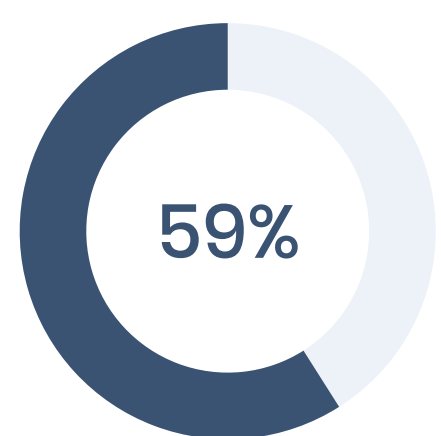
of customers prefer phone calls over other communication methods to connect to businesses (Ascend Inbound Marketing Research)



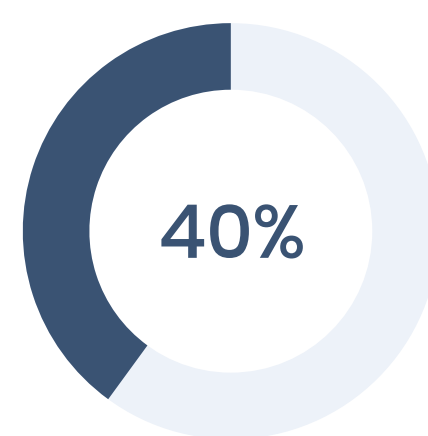
of consumers think that new conversation technology will result in no change or will even worsen the customer service experience (Global Customer Service Insights, Loyalty360)



conversion rates as a result of phone calls (Ascend Inbound Marketing Research)



of customers say tailored engagement based on past interactions is essential to winning their business (Freespee Call Guide Research)



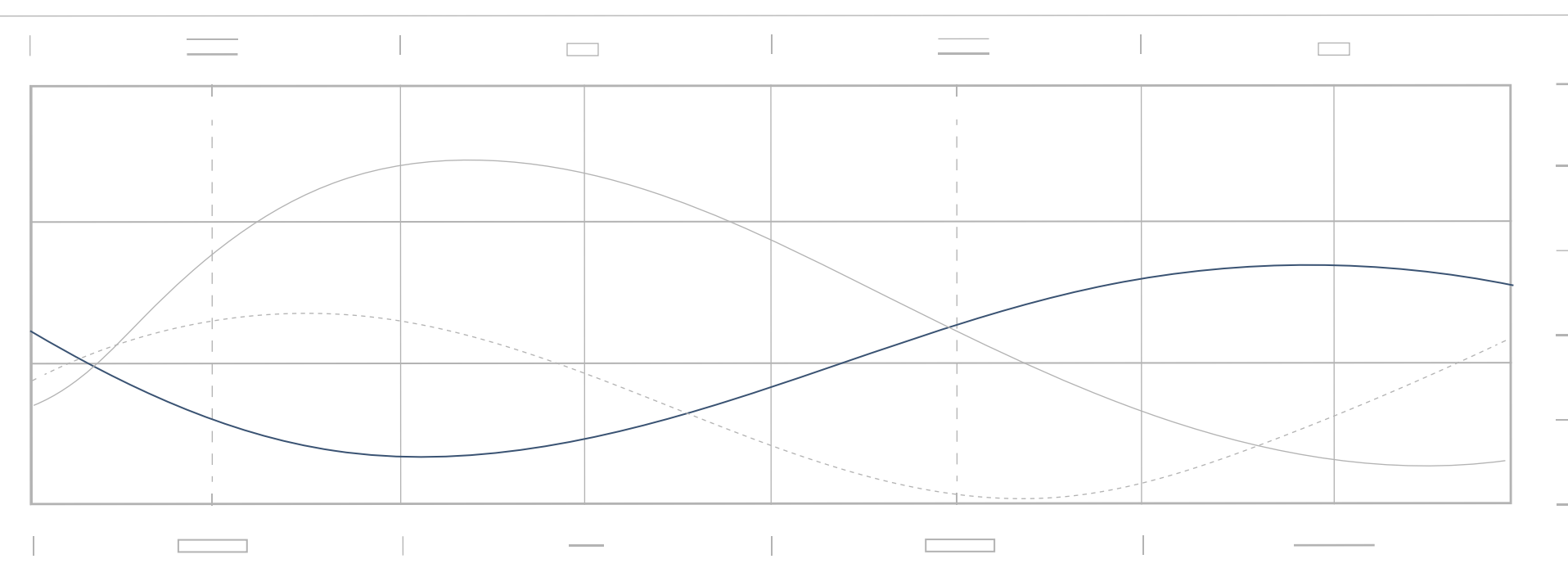
of callers will abandon a phone call after waiting too long in a call queue (Freespee Call Guide Research)

These findings suggest that to gain the trust of customers and prospects, companies need to implement reliable and traditional telephony systems and pack these systems with comprehensive technology and software to personalize the customer call journey. The key to accomplishing all this is through a comprehensive **call tracking software**.

The Call Tracking Funnel

Call tracking technology tracks every phone call to the marketing campaign of its origin. This helps marketers gain information on customer data such as where they're calling from, which keywords they searched for before calling your business, and the reason for the call.

This data then provides marketers with a 360-degree view of customer behavior, giving more insight into a given campaign's performance. With increased campaign insights into calls, marketers are then able to optimize better-performing campaigns and increase their marketing ROI.



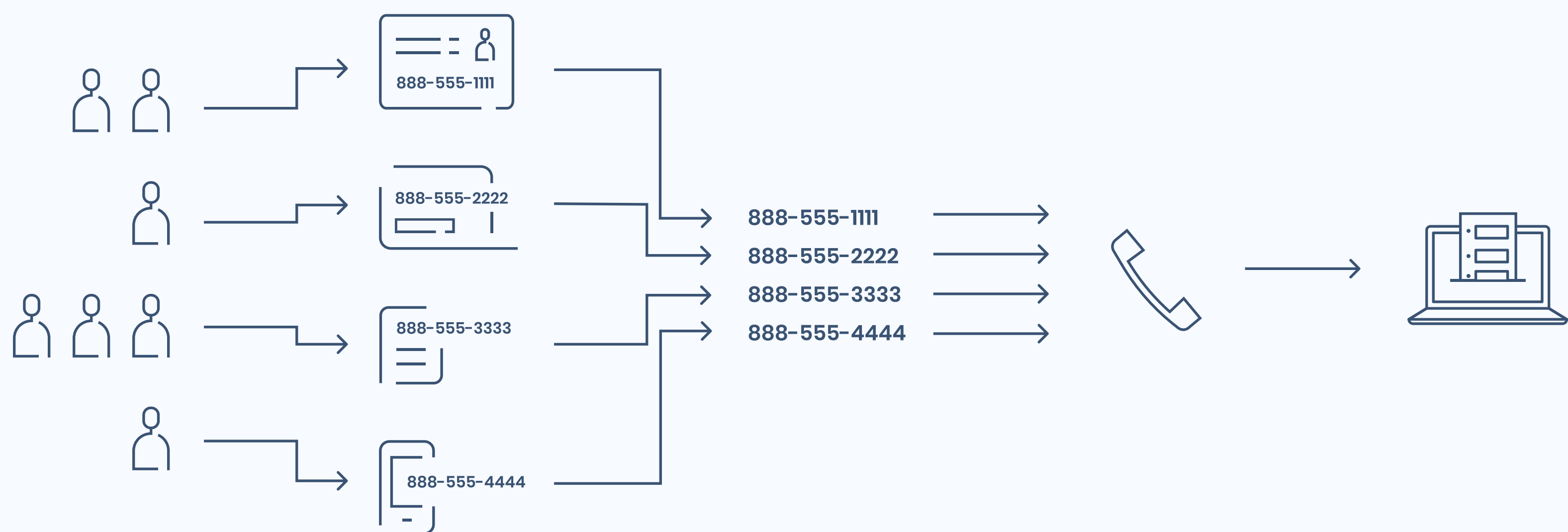
With call tracking, businesses uncover:

- **Call attribution:** helps marketers understand what campaign or marketing effort drove the call outcome.
- **Real-time data analytics:** helps marketers understand best practices of call distribution.
- **Enhanced caller journey:** uses leading technology to streamline the call process to get callers connected to agents more quickly.
- **ROI reporting:** collected first-party data can calculate important metrics like customer acquisition cost or implement lead scoring to focus on only qualified leads.

Beyond Call Tracking: The Lifetime Value

Call tracking isn't just about tracing a call back to a campaign. You can use call tracking software to evaluate the performance of anything that is customer-facing. For example, you can use call tracking tactics to measure the success of your marketing and sales teams to find out who converts the most prospects.

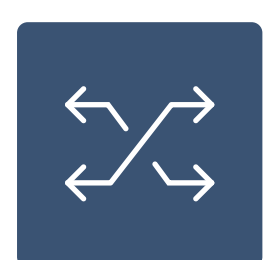
Data gained from call tracking is extremely valuable when deciding how to route calls among your team, or agents in your call center. Another way you can measure the importance of call tracking is by reviewing metrics to identify your company's training needs to ensure your staff is proactive with customers.



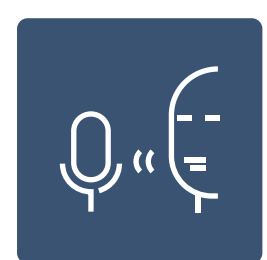
Other intangible metrics include:



Auto-generated agent success rate



PPC landing page information



Visitor-level tracking to identify what keywords are used by customers the most

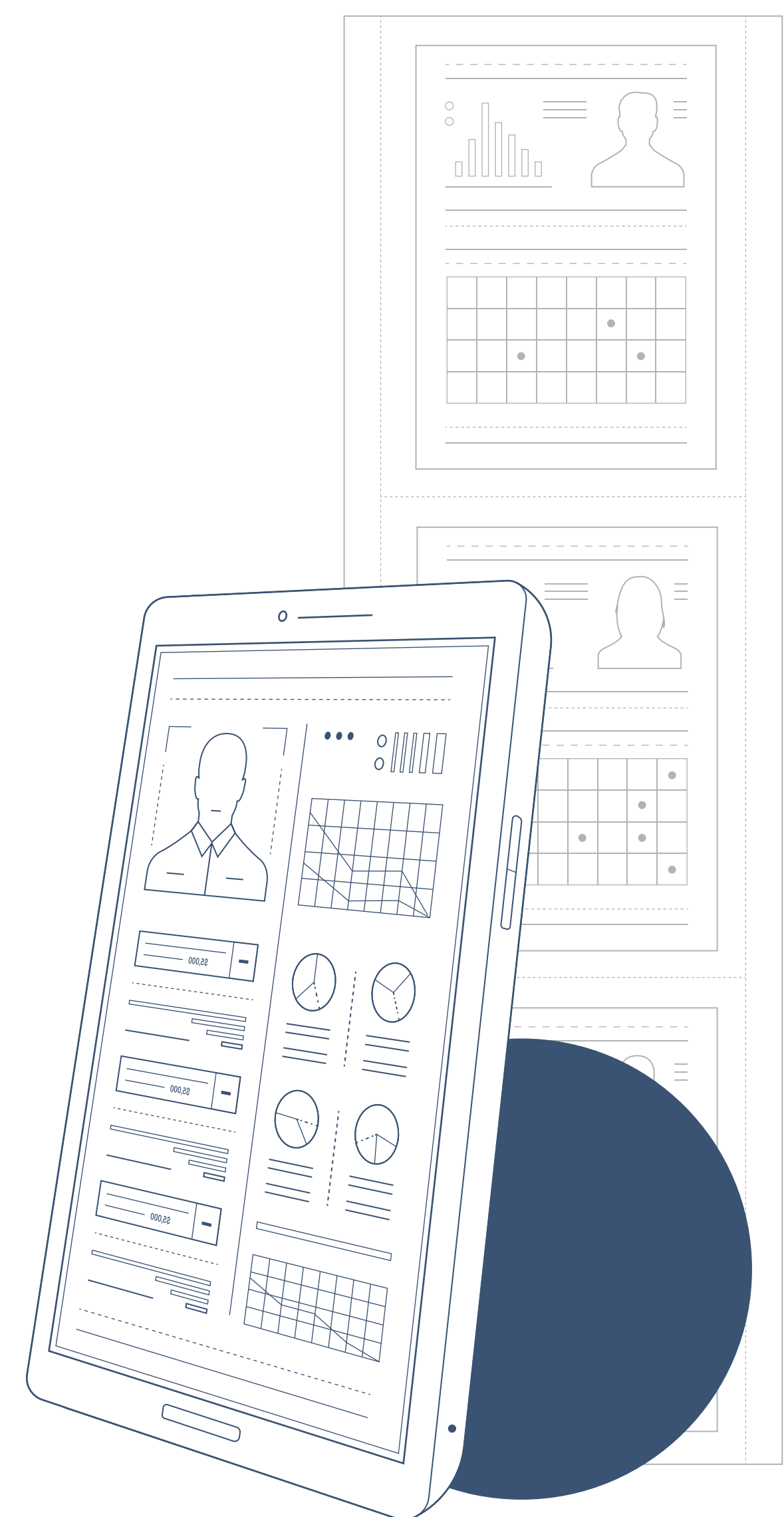
How it Works: Empowering Call Campaigns with Dynamic Number Insertion

Modern call tracking platforms use dynamic number insertion (DNI) to assign a unique phone number to each marketing campaign or effort. When a customer tries to connect with a business over the phone, the call is forwarded from the DNI to the central business line.

A call tracking software attributes all outcomes to an assigned phone number, indicating the call source. On a broader scope, call tracking allows marketers to optimize their campaigns to eliminate practices that aren't working and focus on campaigns that are performing well – all through the use of DNI and real-time call data attribution.

Call tracking captures the following data points:

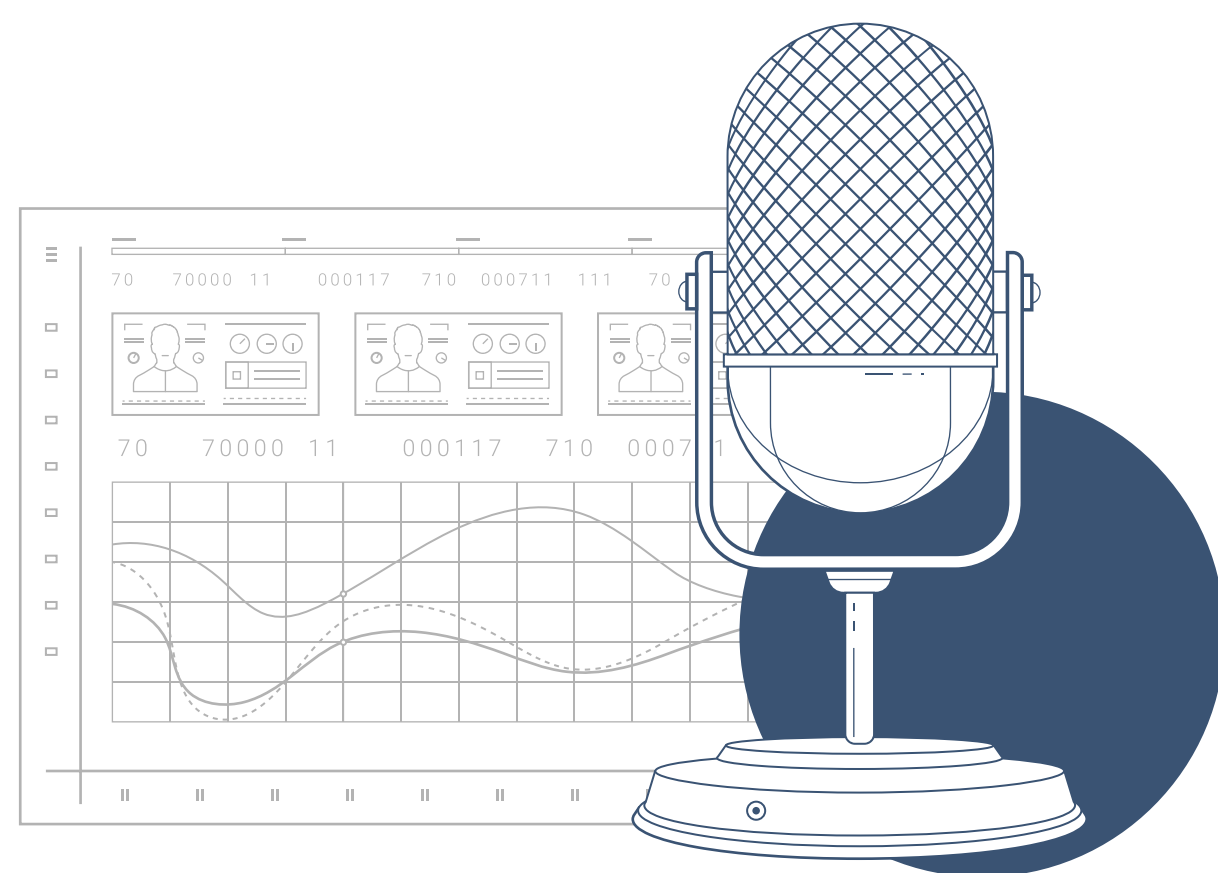
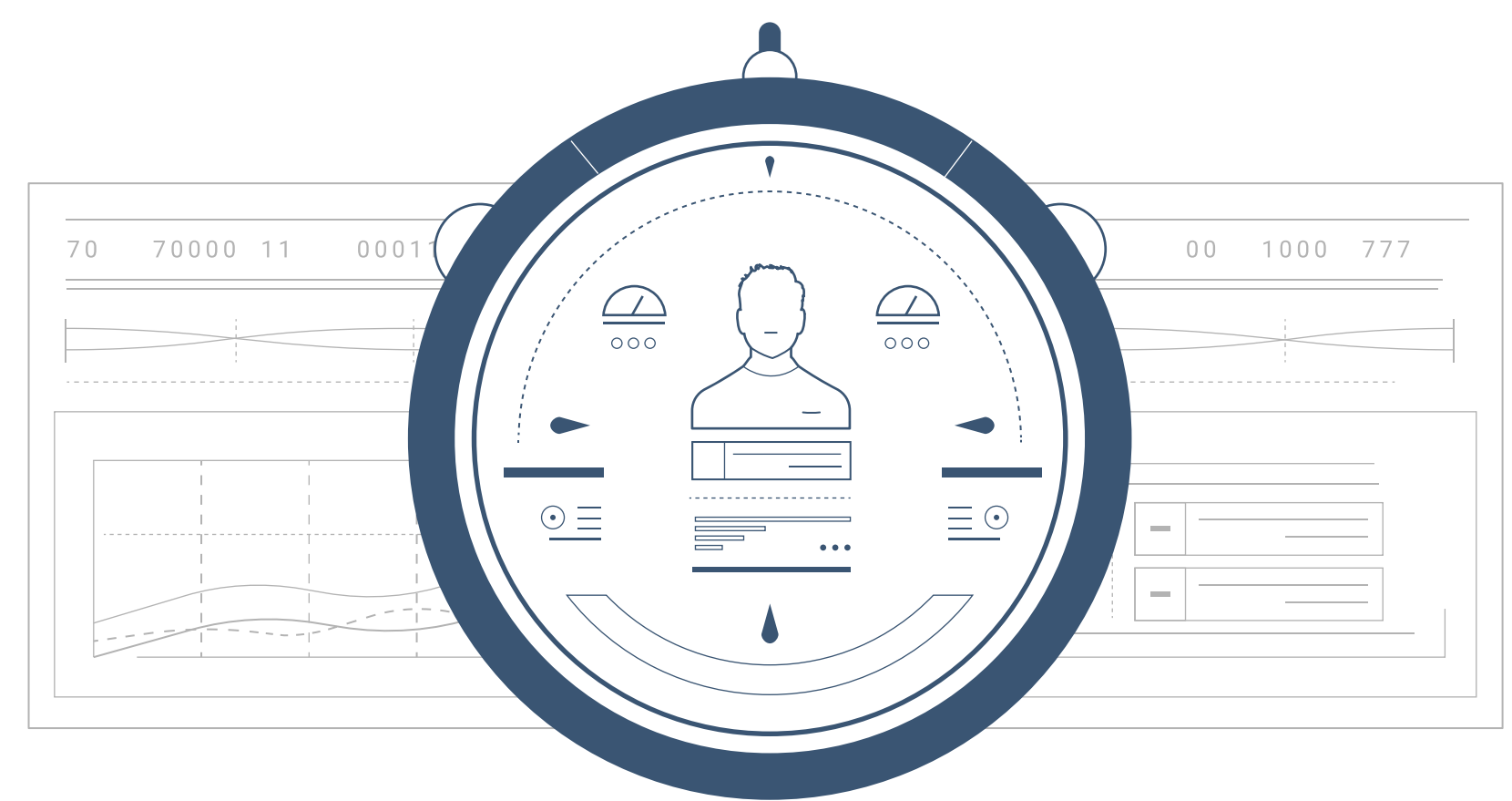
- The campaign, ad group, channel, or webpage the call came from
- The keywords that resulted in the call
- Call date and time
- Caller's name, number, and other demographic information
- The geographic location of the caller
- Call status: answered versus unanswered
- The caller's wait time on the line before connecting
- What product or service the caller inquires about
- Call outcome: conversion or no conversion



The 3 Pillars of Call Tracking and Conversation Intelligence

1. Define the Customer Journey with Call Details

View a line-by-line description of each lead, including whether the lead was sold or rejected, the time stamp, where the lead came from, which buyer it matched with, and whether or not the lead resulted in a product or service sold.

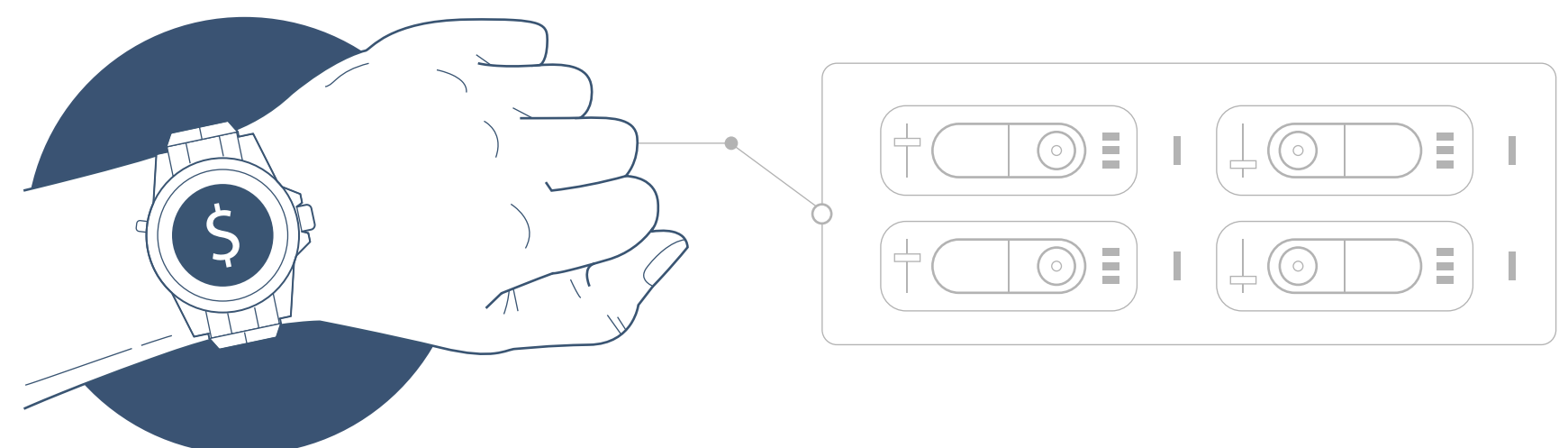


2. Enhance the Call Experience With IVR and Automatic Call Distributor

Effectively manage your incoming calls with data-driven automatic call routing that distributes calls based on caller IVR responses and agent availability. Use filter settings with call tracking software so that high-quality leads are given priority.

3. Get Insights & Tweak Campaigns in Real-Time

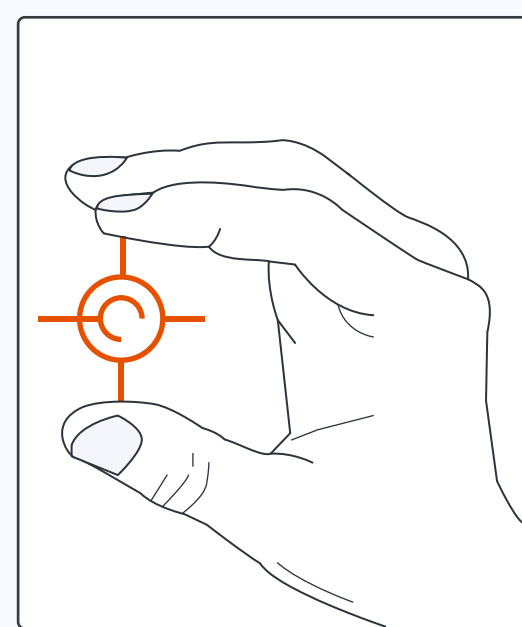
See all your daily traffic and other key performance indicators for your campaigns with one program using a comprehensive “at-a-glance” dashboard. This invaluable solution interface gives you real-time data for your incoming calls.



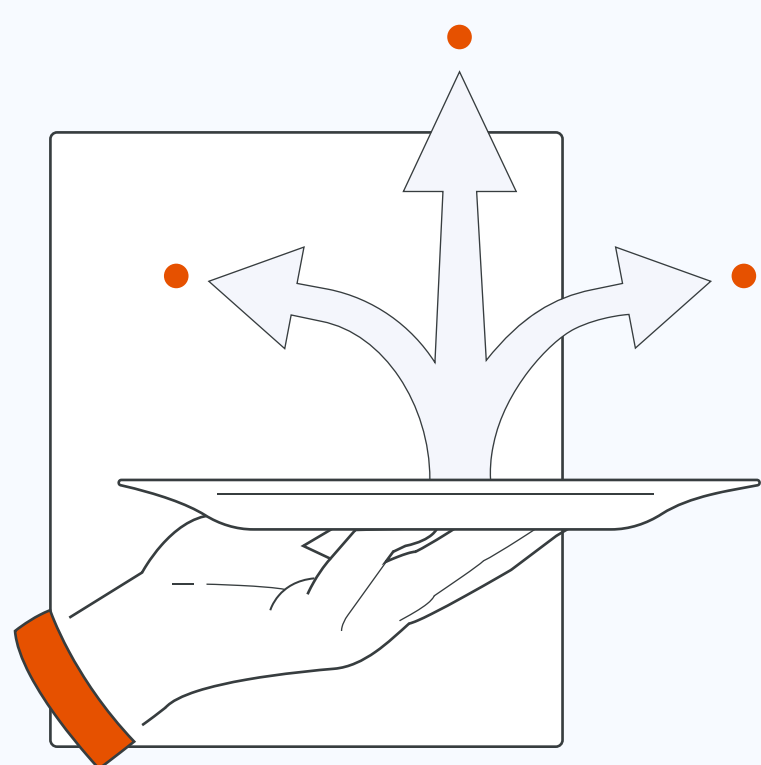
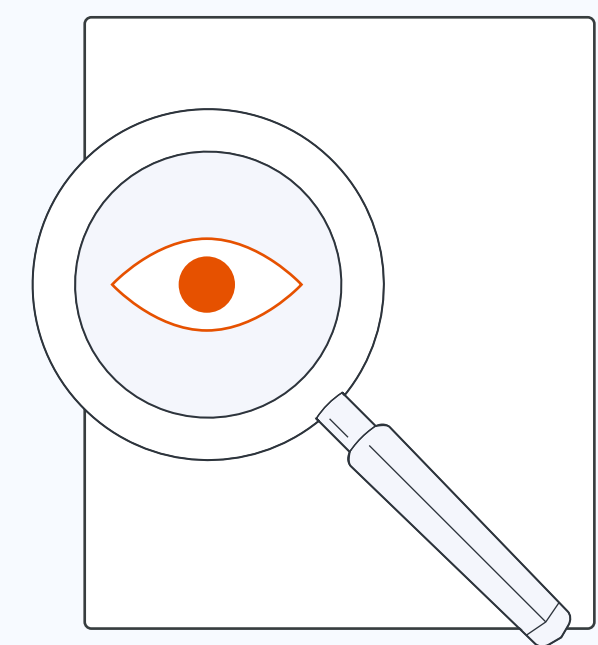
4 Benefits of Investing in Conversation Intelligence

Investing your time and resources into conversation intelligence won't only provide your marketing team with collected data, but it will also shape a well-rounded perspective on how your calls are performing. With so much reporting that shapes the concept of conversation intelligence, using Phonexa's call data tracking tools will land you on the following foundational outcomes:

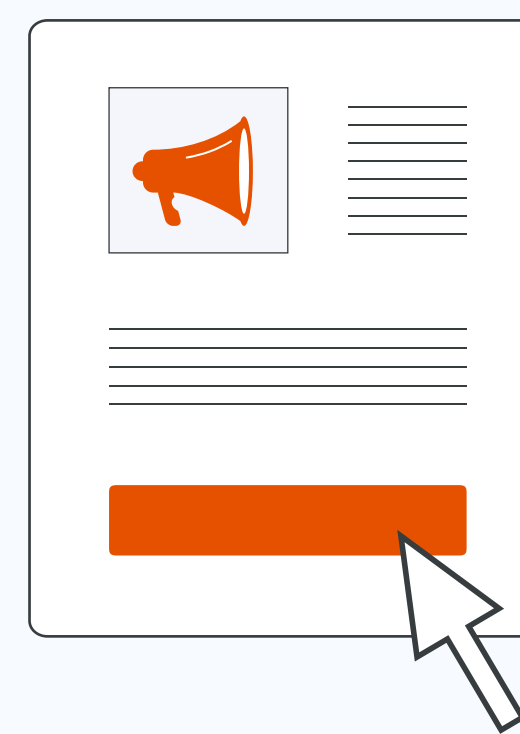
Eliminate Fraudulent Leads & Focus on High-Quality Callers



Learn More About Customers



Boost Call Volume & Revenue

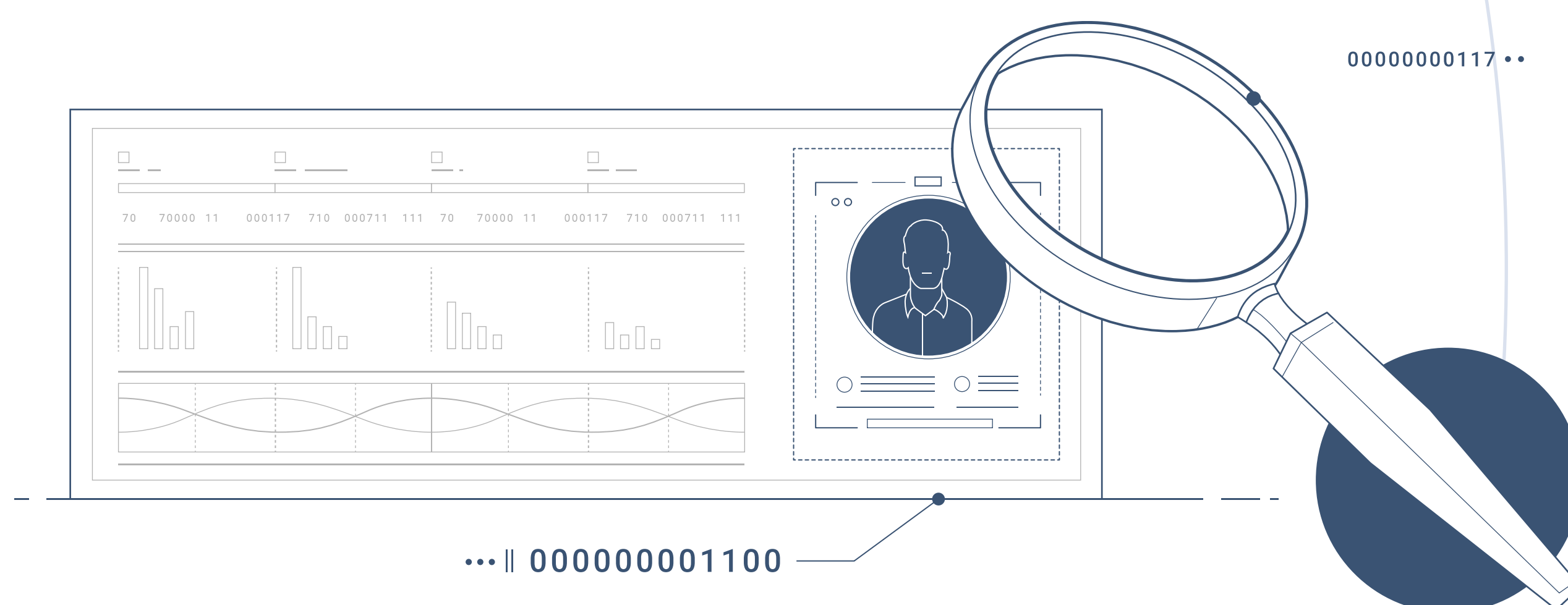


Make Precision Adjustments to Optimize ROI

1. Eliminate Fraudulent Leads & Focus on High-Quality Callers

By pinging call attributes and information to first and third-party databases, call tracking software helps identify potential fraudulent leads by alerting you if the same number has been called multiple times.

You can also eliminate low-interest callers using a filter analyzer, which helps you set certain criteria for the calls and call leads coming through to your system. If a call doesn't meet your specifications, the calling number is flagged and filtered out. This feature is helpful as it helps you keep a clean slate of only the best quality of callers and prospective clients.



2. Learn More About Customers

One of the unknown aspects of call tracking software is its ability to gather and retain caller information. With tools like IVR, a call tracking system collects important caller information and distributes it to the agent in real-time, sometimes even before the call is connected.

By pinging caller information into first-party data sources, call tracking gathers other information about the caller, offering companies a better understanding of caller demographics and needs.

3. Boost Call Volume & Revenue

Call tracking software comes with comprehensive tools that help marketers spot trends, but some software solutions will include predictive analytics. With predictive modeling and call analytics, marketers can see likely outcomes of any given campaign, including budget adjustments and other scenarios.

Marketers use these predictions to plot strategies to increase call volumes or help identify favorable or unfavorable campaign scenarios.



4. Make Precision Adjustments to Optimize ROI

Call tracking lets businesses access a range of detailed reports and functionalities that can be used to make targeted changes to get a better return on overall marketing spend. Marketers can analyze their filter settings to ensure you aren't inadvertently filtering out quality calls. It's also possible to view comparison reports from different date ranges to identify trends or spot issues to be addressed.

Why Businesses Need Call Tracking and Intelligence Software

About 60% of businesses rely on phone calls to drive conversions and revenue. But they don't just sit there and hope that someone calls their business – most marketers pilot various digital marketing efforts and campaigns to get their call centers busy.

But without a good phone intelligence backing, marketers are often left guessing which of their digital campaigns are performing well and which need to be eliminated. The ultimate point is to drive these digital or online sales efforts into offline phone inquiries or a sales commitment from their callers.

Most marketers have tremendous amounts of data and attribution on their digital campaigns, but tendencies show that data trails go cold once a customer heads from a digital search to an offline phone call. While there are some patchy approaches to gathering some data on call outcomes and transferring the information to a CRM or a spreadsheet, these tactics are outdated and limit scalability.

Who Should Use Call Tracking?

Companies of all sizes and from all verticals need call intelligence to bridge the gap between online and offline call interactions and outcomes. The following are some of the business types and verticals that benefit from call tracking and conversation intelligence:

- Insurance Agencies
- Financial Services
- Home Services
- Lead Generators
- Affiliate Networks
- Businesses Who Rely on Calls

Vetting Your Call Tracking Options: What to Look for

Follow this checklist when picking your next call tracking provider.

- ✓ Is the platform or software solution scalable to my business needs?
- ✓ Is it easy and quick to integrate with the rest of my tech stack?
- ✓ What can it do to elevate my call campaigns further?
- ✓ Will it be easy to use?
- ✓ Will the product need other integrations to function better?
- ✓ How can I see my call data?



Unlock the Hidden Value of Call Tracking with Call Logic

Bundled with other marketing automation solutions for web leads, clicks, email, SMS, accounting, and more, Phonexa's call tracking and distribution software, **Call Logic**, is equipped with the right tools to help businesses make data-driven decisions and achieve ROI-focused results for their call campaigns.

With conversation intelligence features like call tracking and analytics, interactive voice response (IVR), predictive modeling, and **Ping Post Calls 2.0**, Call Logic helps businesses scale their call tracking efforts to respond to the ever-changing demands of consumers.

One Suite to Control All of Your Performance Marketing



LMS Sync

Lead Tracking & Distribution



Call Logic

Call Tracking & Distribution



E-Delivery

Email & SMS Marketing



Cloud PBX

Cloud Phone System



Lynx

Click Tracking



Opt-Intel

Suppression List Management



Books360

Automated Accounting

The Phonexa Way

According to G2, with an average of **10 days to onboard clients** with our all-in-one solution for calls, leads, clicks, email, SMS, accounting, and more, Phonexa's comprehensive technology solutions are fully-customizable and integratable with any tech stack.

Our marketing automation suite is enabled by entirely-scalable products that can be used together to support the ROI goals of businesses of all sizes.

Comprehensive Phonexa Products to Elevate Your Call Campaigns

Interactive Voice Response

Activate a guided and automated IVR in your call journey to interact with callers and gather critical information before the call is transferred to the agent.

Automatic Call Distribution

Engage the multi-tier IVR technology to easily route phone calls, make automatic callbacks, handle call traffic, and direct calls to the most qualified agents, all in an automated sequence.

Cloud PBX

Eliminate all hardware, and transfer your business calls into a cloud-based telephony system where you can access previous call data, set up your IVR, or connect with callers at any given time, from any given point in the world.

Ping Post Calls 2.0

Unlock the full power of the **five lead flows** in real-time call bidding and lead acquisitions to generate a robust ROI and achieve a streamlined caller journey and lead transfer.

Are you ready to start making the most of every single call with Call Logic, the most powerful call tracking solution in the market?

Schedule a Consultation

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