

HOW TO

Improve Call Tracking & Monitoring





Why Call Tracking Matters

Companies worldwide spend more than **\$330B annually** on online advertising to generate leads. Chances are, your business **spends at least a few thousand** each year.

While it's possible to track every step of the shoppers online journey, what happens **when they pick up the phone?**

If you aren't tracking the source of those inbound leads, how can you know **which campaigns are worth it?**

Call tracking and monitoring lets you see which channels and lead sources are **working** - and which aren't.

What You'll Learn

- **How to Improve Call Tracking & Monitoring in 6 Steps**
- Best Practices to Evaluate **Advertising ROI**
- **Real-time Insight** into the Customer Experience
- How to Optimize Your **Omni-Channel Marketing Campaigns**
- **Real-World Benefits** from Business Leaders Like You

What is Call Tracking & Monitoring?

Call tracking and monitoring is all about **gaining visibility** into which channels are generating the most leads, and understanding what happens after you connect.

If you're **spending thousands on marketing and advertising**, don't you want to know what's working? That's where call tracking can help.

The top call tracking tools offer tools to **match** a lead to its referring source, **analyze** the call itself, provide **transparency** into lead quality, and identify opportunities to **optimize your marketing spend**.

Some customers even report that call tracking helps them **hold third-party lead vendors accountable**.

Ready to learn more? Here are **6 steps to improve call tracking**. >>

Why Listen to Us?

CallDrip is a global leader in lead response and call-tracking software. More importantly, we're deeply committed to helping our customers grow.

10K+

users around the world.

1M+

leads distributed annually.

<1 min.

average lead response time.

6M+

Connected calls per year.

99.9%

up-time.

HOW TO IMPROVE CALL TRACKING & MONITORING IN 6 STEPS

Step 1: Measure Your Total Advertising Spend By Channel

Generating leads can be expensive. Start out on the right foot by making sure you know how much you're spending on advertising. Look at every online and offline channel, as well as any test campaigns to get a complete picture.

If you already have this, the next step is to look into **total leads generated** by each advertising channel. (Don't look yet at whether those leads turned into customers; that comes later.) Call tracking tools can help with this across channels, from billboards to their digital counterparts, PPC ads.

With this information, you can assess the return on investment, or **ROI, of each advertising channel.**

Remember, this process is not easy. If you're having a hard time attributing leads to sources, you're not alone.

Consumers shop 24/7, and typically interact with a few different channels - like a mailer and a recommendation from a friend - before deciding to buy. Reviewing lead sources and ROI gives you a clearer picture.

Call tracking and monitoring tools make it **easier to analyze** lead sources and ROI.



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Step 2: Sync Calls to Digital Campaigns

One of the **most important tools** for call tracking? Dynamic Number Insertion, or **DNI**.

Dynamic Number Insertion, or DNI **ties phone numbers to online shoppers**. It displays a unique phone number to website visitors, letting you see how they arrived on your site.

With DNI, you can **attribute offline phone calls to specific online advertising sources**. This allows you to identify the digital channels that drove traffic to your website and ultimately led to conversations with your team.

When a lead calls the number, they'll reach your team, and **you'll be able to see** which specific digital channel they came from.

Source attribution offers transparency into digital advertising, allowing you to **optimize spend** on the top performing channels.

DNI helps you accurately track calls and lead source - **automatically**.

Step 3: Capture Caller Information

When a lead calls in, are you **automatically tracking** their name and information? Or are you relying on a receptionist or sales person to take the notes and input them into your CRM when they have more time?

All too often, details like name, phone number, and inquiry aren't saved or entered into your system, and they're **lost for good**.

In step one, you discovered how much the lead cost you to generate. If you're not recording their information accurately and consistently, that **money is wasted**.

To solve this, make sure your call tracking and monitoring solution automatically **captures prospect data**, and **syncs with your CRM**. That way, you won't worry about a single prospect "slipping through the cracks."

Calldrip's call tracking solution lets you collect and measure your online and offline **marketing efforts in real-time**. You'll know what's working, and ensure that all of your marketing decisions are backed by data.

39% of businesses say their data **isn't collected frequently or quickly enough**.

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Step 4: Monitor with Call Recordings

How are your sales reps **sharing information** and insights about their prospecting calls? In many organizations, this process is manual: sales people take notes during the call, and then add them to a CRM afterwards.


That can create gaps. If you ever feel that you're not sure what your sales team says, worry that details are lost, or struggle with unqualified leads, then it may be time for **enhanced call monitoring**. Call monitoring provides visibility into the call quality, and helps ensure you **never lose valuable data**.

Call monitoring typically involves **recording** and sometimes **transcribing** calls, and then reviewing them either manually or with AI-based triggers. Here's how call monitoring looks with Calldrip:



Score Card

WOW



71%

Gloria Roberts

Name: Ben Butterfield
Phone: (801) 742-8354
Email: benb@email.com
Call End: Conversation

Source: Demo Page
Date: Jan 18, 2021
Time: 5:44:50 pm

Alert
Applause

Opportunity
YES

Goal
YES

Score Card

YES	Proper Introduction
YES	Feature Inquiry
YES	Trade Inquiry
NO	Interest in Trade
YES	Attempted Appointment
NO	Sell Dealership
YES	Set Appointment

HOW TO IMPROVE CALL TRACKING & MONITORING IN 6 STEPS

Step 5: Build in Sales Coaching

Coaching is all about empowering your sales team to **consistently improve performance** and enhance the quality of the connection.

All too often, businesses **make the mistake** of relying on infrequent coaching and training sessions. This can result in lost sales opportunities, costing tens of thousands of dollars.

Active coaching helps optimize the performance of each team member. This requires **ongoing monitoring** and **review of their actual phone conversations**.

In that way, **coaching and call monitoring** go hand-in-hand.

Continuous, personalized coaching reinforces the skills required to be successful, **generating more appointments** and **driving more sales**.



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Step 6: Measure Each Channel's Value

Getting clear data, and measuring accurately, is key to creating a **high-functioning sales and marketing strategy**. Without this data about online and offline lead sources, you're making educated guesses about what's working.

If you're **spending hundreds or thousands of dollars**, isn't it worth it to make sure you know the value of each channel?

You've already built the foundation with Step 1. Now, it's time to **evaluate the quality** of those leads by looking at new opportunities and closed-won sales.

Look at the **number of new customers** that came from each lead source. Consider all sources, including newspaper ads, billboards, direct mail, social media campaigns, email marketing, and more. It may also be helpful to look at what percentage of new leads scheduled a scoping call, to provide insight into **lead qualification**.

Call tracking and monitoring gives you the data you need to level up.

With this info, you can pinpoint how many leads each source generates, the connection rate for each of your sources, and ultimately, how many appointments and sales are generated from each source.

Now, you can **optimize your digital marketing spend**.



How Calldrip's Call Tracking Works

1. A LEAD SUBMITS AN INQUIRY

When a prospect calls your business, Calldrip instantly identifies the campaign source and captures the prospect information.

2. CALLDRIP CONNECTS THE CALLER TO THE RIGHT PERSON

Calldrip automatically kicks off a call to the right sales rep, based on your customized lead routing. When your sales rep answers, they hear a quick whisper message identifying the campaign source so they have background ahead of the conversation.

3. MONITOR THE CONVERSATION

Right after the whisper, the caller is connected. Calldrip automatically begins monitoring the conversation.





Respond to Leads in Seconds & WOW Your Customers

For sales-focused organizations, optimizing rapid lead response can be transformative.

If you're looking to quickly and confidently connect with your prospects at the peak moment of interest, consider Calldrip.

Our all-in-one rapid lead response tool includes:

- **Instant phone and text response** to all your leads
- **Web chat tool** with phone and text functionality
- Configurable **lead routing**
- Customizable **call tracking**
- **Advanced analytics**
- Built-in call scoring and **coaching tools**
- **Online review capture** and reputation management
- Dedicated, **best-in-class customer success** team for your account

At Calldrip, we're here for you every step of the way.

Book a free 30-minute demo today!