

What 100M phone calls reveal about data-driven marketing

Masami Middleton, Chief Marketing Officer, CallRail

Ryan Johnson, Chief Product Officer, CallRail

Meet Masami



Masami Middleton
Chief Marketing Officer
CallRail

Meet Ryan



Ryan Johnson
Chief Product Officer
CallRail

CallRail by the numbers



1 Billion+

Call volume
500B+ spoken words



200,000+

Businesses use CallRail, including
7,000 marketing agencies

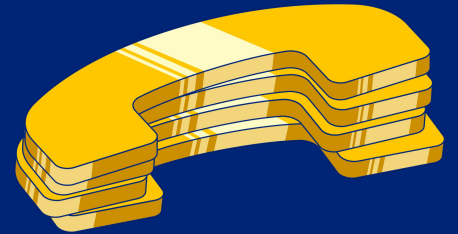


3,000+

Installs by HubSpot users.
A top app in calling category.

What phone calls reveal
about data-driven marketing:

**Your conversations
are a **goldmine** of
untapped insights**



Inbound Callers = Your Best Leads



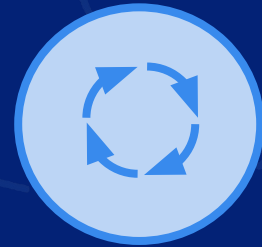
High buying
intent



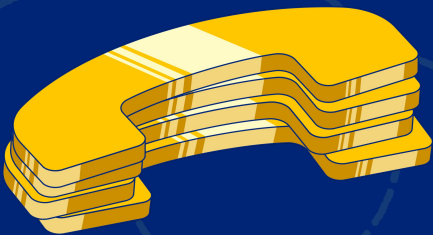
Consent



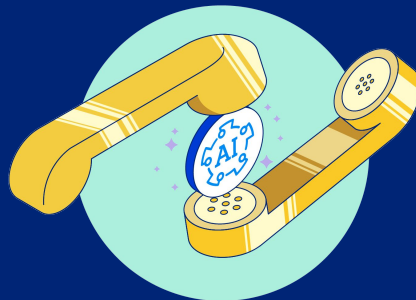
Efficient
conversion path



Robust
usage



Mining the gold in conversations



The first era: Call Tracking

Call attribution

Call recording & transcription

Lead qualification

CRM integration

Marketing ROI



Call Tracking: The first gold mined from conversations



Google Search:

“Family attorney near me”

Website Visit:



Viewed 3 pages, then called the business



Conversation with intake agent, who schedules a consultation

Conversion data sent to Google; Google optimizes campaign



Agent marks lead as Qualified

Call Tracking: The first gold mined from conversations



Call Tracking: Feeding deeper insights to HubSpot

Add to existing contact or create new one

Marketing source of the call

PPC keyword

Landing page

The screenshot displays the HubSpot interface for a contact record. On the left, the contact profile for Jennifer Thompson is shown, including her profile picture and various action icons (Note, Email, Call, Task, Meeting, More). Below this, the 'About this contact' section lists marketing and contact details: Email, Phone number (850-660-0687), Last contacted (08/24/2023 9:18 AM EDT), Lifecycle stage (Lead), Source (Google Ads), Last Keywords ('family attorney near me'), Last Landing Page (www.langelyandlorenzesq.com), GCLID (cWb...), Call Recording Link (https://app.callrail.com/calls/CAL4f9360decaea4589ad8ef6467af69bef/recording/redirect?access_key=a1c1a5034a361d3108f9), and Last Source Contacted (Armature Works Bench Ad).

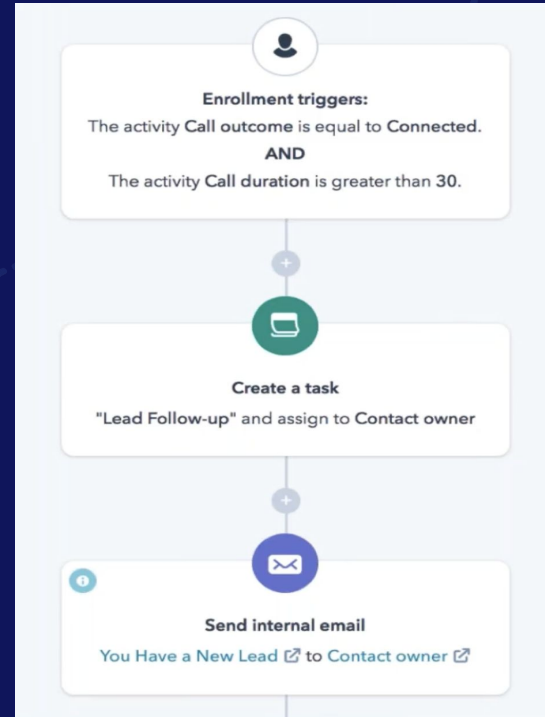
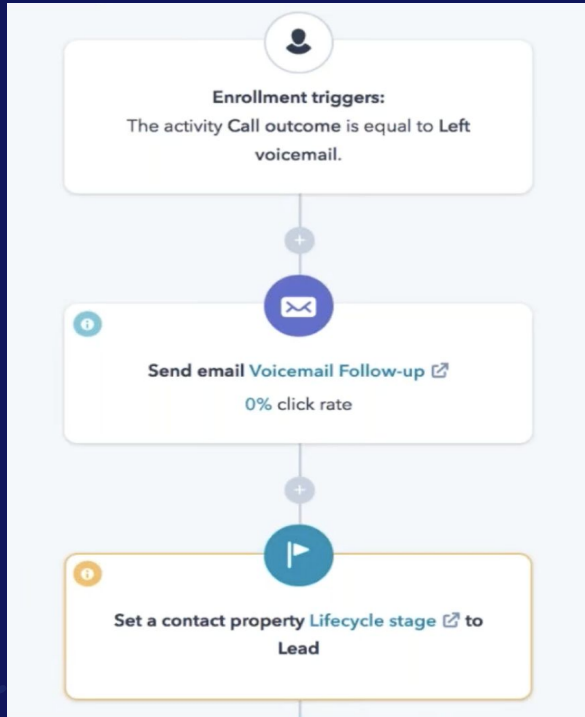
The main area shows the 'Contact Record' for Jennifer Thompson, with tabs for Overview, Activities, and a search bar. The 'Activity' tab is selected, showing a list of activities. The first activity is an 'Inbound Call from Jennifer Thompson' on August 24, 2023, at 9:18 AM EDT. The call summary states: 'Jennifer Thompson is looking for legal representation. Amanda from Langley and Lawrence Law office helps to schedule a consultation with Attorney Langley next Wednesday at 02:00 pm. Amanda asks Jennifer to bring relevant documents.' The call status is 'Connected' and 'Inbound'. A progress bar shows a call length of 1:26. Below the call summary, there is an 'Add comment' button and a note about '1 association'. The second activity is a 'Call - Connected' on August 24, 2023, at 9:13 AM EDT, with a similar summary. The third activity is a 'Lifecycle change' on August 24, 2023, at 9:10 AM EDT, stating 'The lifecycle stage for this contact was updated to Lead. View details'. The final activity is a note: 'This contact was created from Offline Sources from Integration' on August 24, 2023, at 9:10 AM EDT.

Call summary

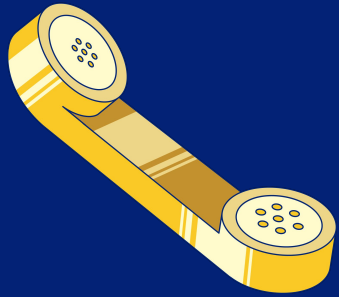
Call length

Call recording

Call Tracking: Trigger workflows in HubSpot.



The future of the phone call:
Much more gold remains untapped



Call attribution

Call recording

Lead qualification

CRM integration

Marketing ROI

Keywords, phrases

Buying intent

Product/service interests

Sentiment

Agent performance

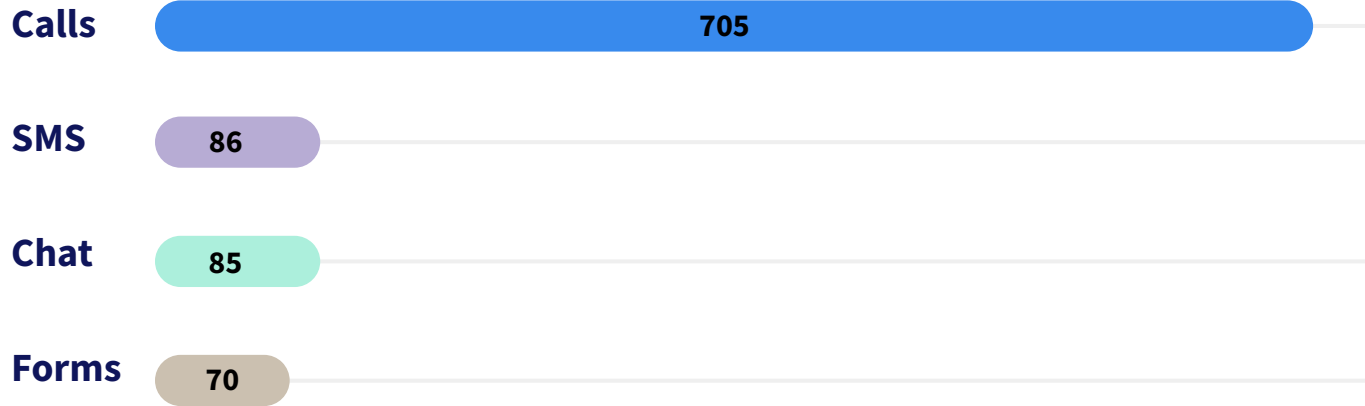
Call outcomes

Patterns across calls



Calls: The richest source of intelligence.

Average words per session



Source: 2023 CallRail data across calls, text, SMS, and forms submissions.

Conversation data could improve...



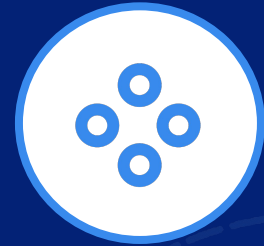
**Lead
Conversion**



**Customer
Experience**



**Agent
Performance**



**Marketing
Optimization**

Complete Comfort: Thank you for calling Complete Comfort, this is Mark speaking. How may I help you today?

Danielle: Hi, I need someone to come take a look at my hot water heater. I think there's something wrong with it.

Complete Comfort: I'm sorry to hear you're having trouble with your hot water heater. Can you tell me a bit more about what's happening?

Danielle: Well, lately I've been smelling gas in the house, especially when the hot water is running. I had a technician come take a look yesterday and he said it's backdrafting carbon monoxide when the burner turns on. He recommended I get it replaced with a direct vent water heater.

Complete Comfort: That does sound concerning. Gas is definitely nothing to mess around with. I'm glad you had it inspected right away. Replacing your current water heater with a direct vent model would resolve the backdrafting issue. Here's what I can do to get the ball rolling:

First, I will enter a service request for one of our technicians to come inspect your current system. They can confirm if a replacement is needed and provide a quote for the new equipment and installation.

For a direct vent replacement, we typically recommend tankless water heaters. These are very efficient and safe. We offer models from top brands like Rheem, Bradford White, and Navien. The technician will go over the different options to choose the right size and specifications for your home.

Once we have a quote, we can schedule a time that's convenient for you to have our team come replace the old water heater. We know hot water is essential, so we'll make sure the work is done as quickly as possible. Our technicians are highly trained and experienced, so you'll be in good hands.

Complete Comfort: I completely understand, we don't want you exposed to that for any longer than necessary. Let me take a look at our schedule...

It looks like we have availability for a technician to come tomorrow morning, say around 9 or 10 AM. Would either of those times work for you?

Danielle: 10 AM tomorrow would be perfect. I'll make sure I'm home to let him in.

Complete Comfort: Great, I have you scheduled for an inspection at 10 AM tomorrow. The technician will call when he's on the way and make sure you have safe levels of CO in your home.

After the inspection, we'll provide a detailed quote for replacing the water heater. Please let me know if you have any preferences on tankless vs. tank models or particular brands - we can factor that into the recommendations.

Once you review the quote and decide how you'd like to proceed, just give us a call back and we can get you a new direct vent water heater installation on the books. We typically can install within a few days of ordering equipment.

Danielle: Ok, that all sounds good. As long as it's a direct vent tankless model that will prevent the backdrafting, I'm fine with your team choosing whichever make and model you recommend. Thanks for getting someone out here so fast.

Complete Comfort: You're very welcome. We know how stressful and dangerous this situation is, so we aim to provide prompt solutions.

Before I let you go, could I just confirm your zip code? That ensures we

The Challenge: Extracting the gold. Scanning a single transcript for just a few nuggets is hard.

Complete Comfort: Thank you for calling Complete Comfort, this is Mark speaking. How may I help you today?

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Complete Comfort: I'm sorry to hear you're having trouble with your hot water heater. Can you tell me a bit more about what's happening?

Danielle: Well, lately I've been smelling gas in the house, especially when the hot water is running. I had a technician come take a look yesterday and he said it's backdrafting carbon monoxide when the burner turns on. He recommended I get it replaced with a direct vent water heater.

Complete Comfort: That does sound concerning. Carbon monoxide is nothing to mess around with. I'm glad you had it inspected right away. Replacing your current water heater with a direct vent model would resolve the backdrafting issue. Here's what I can do to get the ball rolling: First, I will enter a service request for one of our technicians to come inspect your current system. They can confirm if a replacement is needed and provide a quote for the new equipment and installation. For a direct vent replacement, we typically recommend tankless water heaters. These are very efficient and safe. We offer models from top brands like Rheem, Bradford White, and Navien. The technician will go over the different options to choose the right size and specifications for your home. Once we have a quote, we can schedule a time that's convenient for you to have our team come replace the old water heater. We know hot water is essential, so we'll make sure the work is done as quickly as possible. Our technicians are highly trained and experienced, so you'll be in good hands.

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Complete Comfort: You're very welcome. We know how stressful and dangerous this situation is, so we aim to provide prompt solutions.

Before I let you go, could I just confirm your zip code? That ensures we dispatch the nearest technician with the shortest travel time.

Danielle: It's 97504

Complete Comfort: Perfect, I have all the details I need to get your service scheduled. If anything changes or you have any other questions in the meantime, don't hesitate to give us a call. Our office is open 8am to 5pm Monday through Friday.

Danielle: Ok great. I'll talk to you

tomorrow. I'll make sure I'm home to let him in.

Complete Comfort: Thank you for calling Complete Comfort, this is Alex speaking. How can I assist you today?

Danielle: Hi, this is Danielle again. I spoke with someone earlier this week about having my water heater inspected and replaced.

Complete Comfort: Ah yes, Danielle. I see in our notes here that we had scheduled a technician to go assess your water heater on Tuesday. Were they able to come take a look?

Danielle: Yes, the technician did come on Tuesday morning. He confirmed the water heater was backdrafting carbon monoxide when the burner turned on. He recommended I get it replaced with a tankless water heater.

Complete Comfort: Okay, great that he was able to inspect it and provide a quote. Do you have a preferred time to schedule the installation yet?

Danielle: Well, that's why I'm calling back. I authorized the work and was told someone could come replace it on Thursday. But no one showed up on that day. I've had to call back several times and they've had to leave messages.

Complete Comfort: I sincerely apologize for the missed appointment and lack of communication. That is completely unacceptable customer service. Let me pull up your file and see what happened...

I'm very sorry about this - it looks like your installation work order failed to be properly scheduled in our system after you approved it. I take full responsibility for dropping the ball. You never should have been left hanging like that.

Danielle: I have to be honest, I'm quite upset. You all seemed very concerned about the dangerous carbon monoxide situation when I first called. But then I hear nothing

ASAP, the smell seems to be getting worse. I just hope I don't have to go through something like this again. Do you really think you can get someone out to replace the heater without it falling through the cracks this time?

Complete Comfort: I give you my word that I will stay on top of this myself to be absolutely certain we resolve this for you quickly and seamlessly. You've already spent too much time worrying about this hazard.

To start, I will re-enter the work order right now and call our on-duty technician to be at your home today if possible. Whenever you need us there, we will make it happen. I will also personally call you until the job is fully completed to your satisfaction. Our manager will be informed as well so that we can prevent this from occurring again. We want to earn back our trust. Please accept our sincere apologies that we caused this delay and worry. I appreciate you giving us another chance to make this right. What day and time works best for you?

Danielle: I'm sorry you folks would have to deal with this. I appreciate you folks for taking the time to hear me out and trying to help me out. I've had to call back several times yesterday too but had to leave messages.

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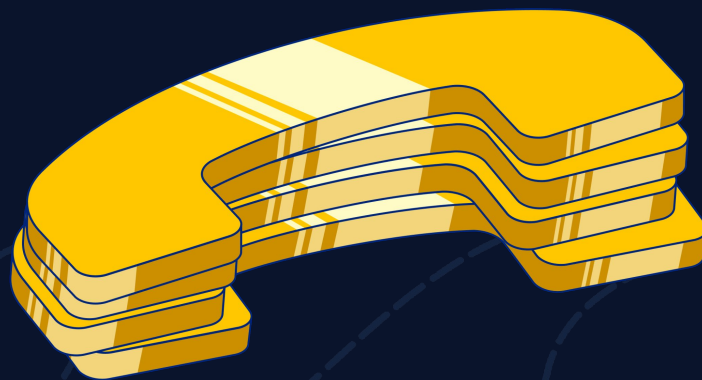
Mining transcripts of all your team's conversations is even harder



The Challenge: **Extracting the gold**

Humans don't have the capacity or capability to analyze hundreds of calls, transcripts, or marketing data.

Plus, manually identifying patterns across calls, agents, locations, or campaigns is virtually impossible.



The Answer: Superhuman AI

Amy Willis
Amy.Willis@email.com
216-999-0582
Source: [Google Ad](#)

Call Summary
Inbound Call on Feb.6 4:44pm
Caller wanted an appointment for Friday. Rep asked for details about the appointment and location. Appointment scheduled with field rep.

Overall sentiment
Positive

Neutral
Negative

INSIGHTS
Gerald calls Cassandra to cancel a cleaning scheduled for tomorrow because of work...

Action Plan
1. Cancel the noon cleaning appointment
2. Remove Gerald from the schedule
3. Note that Gerald will call back

Friday
appointment
location
scheduled

purpose-built to understand and analyze speech

Two real-world examples

Using AI to mine gold from conversations

Real-world example 1: Home Services Business

Business:

Plumbing and HVAC

Marketing:

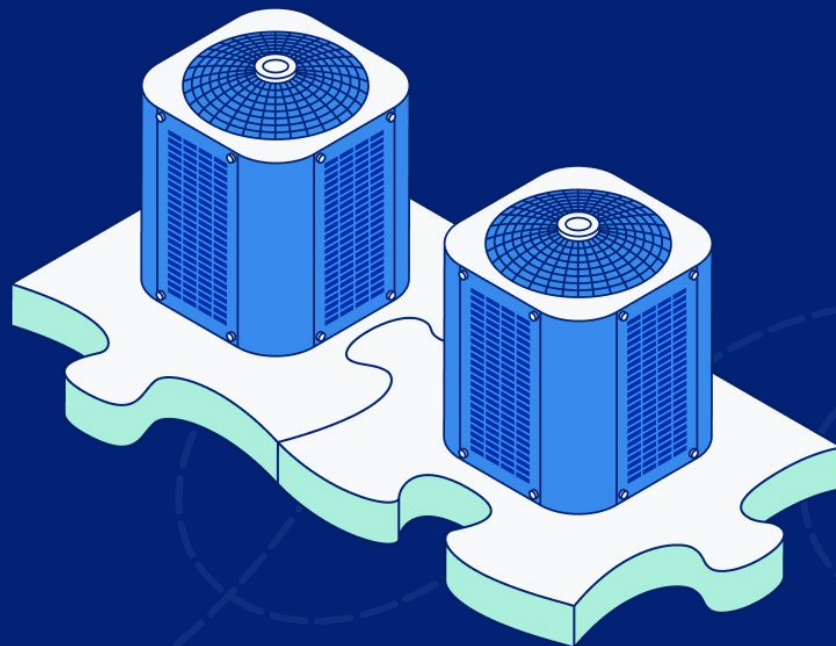
Google Ads, Truck wraps, Google Business Profile

Lead Source:

1st inbound call from Google Business Profile

Lead Background:

3 calls with the customer over five days regarding a complex issue.



Use AI purpose-built for voice with **superhuman accuracy**

Call Transcript

Complete Comfort: Thank you for calling Complete Comfort, this is Mark speaking. How may I help you?

Danielle: Hi, I need someone to come take a look at my hot water heater. I think there's something wrong with it.

Complete Comfort: I'm sorry to hear you're having trouble with your hot water heater. Can you tell me a little more about what's happening?

Danielle: Well, lately I've been smelling gas in the house, especially when the hot water is running. I had the gas company come take a look yesterday and he said it's backdrafting carbon monoxide when the burner turns on. They recommended I get it looked at and potentially replaced with a direct vent water heater. So it's turned off now on pilot, so it's okay. I just need to wait to see about the heater. So that's not an emergency. Yeah, I need help.

Complete Comfort: That sounds like a pretty serious situation. I'm glad you had it inspected right away. A direct vent heater is something one of our technicians can help you with. Whatever, but we definitely need to do and have an idea of how much the price will be to go ahead and get that switched out for a new water heater. Here's what I can do to get the ball rolling:

First, I will enter a service request for one of our technicians to come inspect your current system. They will confirm if a replacement is needed and provide a quote for the new equipment and installation.

For a direct vent replacement, we typically recommend tankless water heaters. These are very efficient and safe. We offer models from top brands like Rheem, Bradford White, and Navien. The technician will go over the different options to choose the right size and specifications for your home.

Once we have a quote, we can schedule a time that's convenient for you to have our team come replace the old water heater. We know hot water is essential, so we'll make sure the work is done as quickly as possible. Our technicians are highly trained and experienced, so you'll be in good hands.

Does this plan make sense? I want to make sure we get this taken care of for you in a timely manner.

Danielle: Yes, that all sounds good. I definitely want to get this fixed right away, it makes me really nervous having carbon monoxide in the house. How soon could you have someone come for the inspection and quote?

Complete Comfort: I completely understand, we don't want you exposed to that for any longer than necessary. Let me take a look at our schedule...

Call
#1

6 min 21 sec

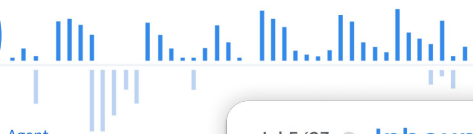
825 spoken words

Transcript Highlights:

- *“Hot water heater is backdrafting carbon monoxide.”*
- *“Gas company is involved.”*
- *“Appointment as soon as possible.”*
- *“Fix or replace?”*

AI summarizes insights across three calls

Call #1



- Agent
- Customer

Jul 5 '23 Inbound Recorded Call

9:11 AM 6m 21s

Visitor Source

9:11 AM

Source Google My Business
Medium search

Tags: **Qualified Lead** × Answered ×

Potential Sale × New Call ×

Overall sentiment



Positive

Summary Transcription

Danielle calls Complete Comfort because her hot water heater is backdrafting carbon monoxide. Her gas company is involved and she needs to have it checked to determine if a she can fix or should replace the water heater.

AI surfaces Action plan and Agent coaching recommendations

Call
#1



INSIGHTS

Danielle calls Complete Comfort because her hot water heater is backdrafting carbon monoxide in her house. She wants to have it checked out and get the direct vent water heater.

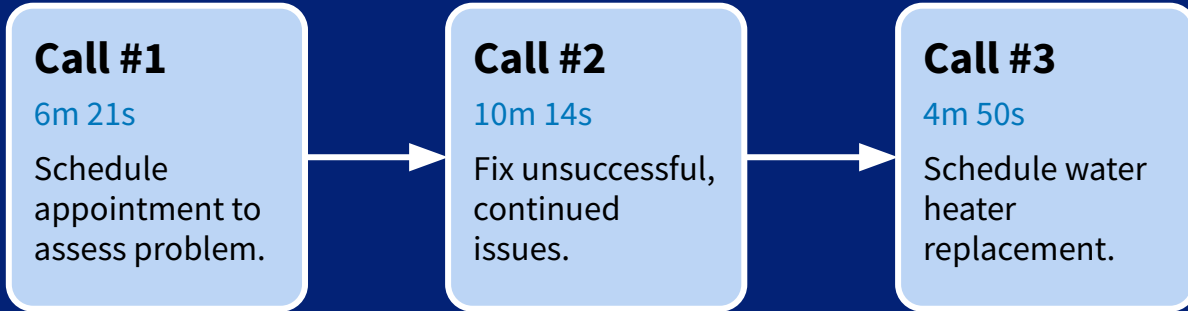
Action Plan ALPHA

1. Identify technician experienced with backdrafting issues.
2. Submit request for technician to check the water heater.
3. Begin gathering estimates for direct vent or tankless water heater.

Agent Coaching

1. Confirm the customer's zip code earlier in the call to determine coverage area.
2. Ask more questions upfront to determine the full scope of work needed.
3. Explain that a technician visit is needed to fully assess the screens before providing an estimate.

AI summarizes insights across three calls



Summary of Multiple Interactions:

The customer has been having issues with her hot water heater backdrafting carbon monoxide into her house for over a month. Complete Comfort visited her house to fix the issue but was unsuccessful. The gas company recently told the customer that her only options are to get a new water heater like a direct vent or tankless water heater. The customer called Complete Comfort to get a quote on replacing the water heater and was told someone would follow up with options and an estimate.



AI recommends actions across agents



Recommendations for the Next Agent

- **Send an experienced technician** who knows about backdrafting issues
- **Follow up with customer** with estimates and next steps to schedule installation
- **Create estimates** for the water heater replacement options
- **Apologize** for the frustration and inconvenience

Time Savings

94%+ time savings for agent or manager*

* Assumes 10-11 sec each to read 3 summaries, action plan and coaching tips, versus reading 3,213 words for 14 min across 3 transcripts or listening to 21.5 min of call recordings.

Business Implications: **Insights across calls**



- At-a-glance insights for managers and owners on customer interactions and next steps
- Immediate visibility on quality of conversations, how to coach for improvement

Quick Lead Intelligence

Improved Customer Experience

- Agents pick up from where others left off without skipping a beat
- Action plans and coaching allow agents to better serve customers



Real-world example 2: Paving Installation Business

Business:

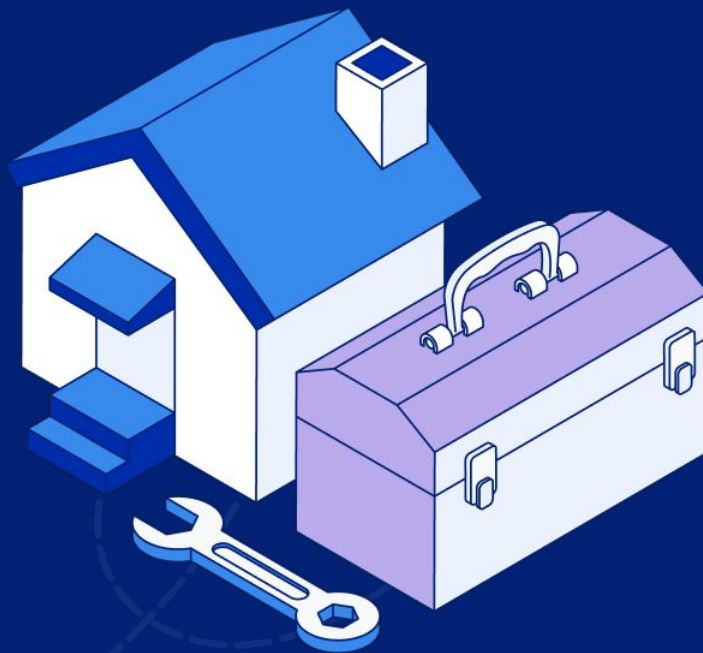
Specialized in new
concrete **installation**

Lead Source:

Google Ads

Call Length:

<1 min over multiple calls



Analysis: most callers (76%)
wanted something the business didn't sell

*Do you sell concrete?
I want to pour
concrete.*

*We don't sell
concrete here.*

*Do you fix and
seal concrete?*

*No, i'm sorry,
we do not.*

From the call transcript

Implications: Make money or save money?

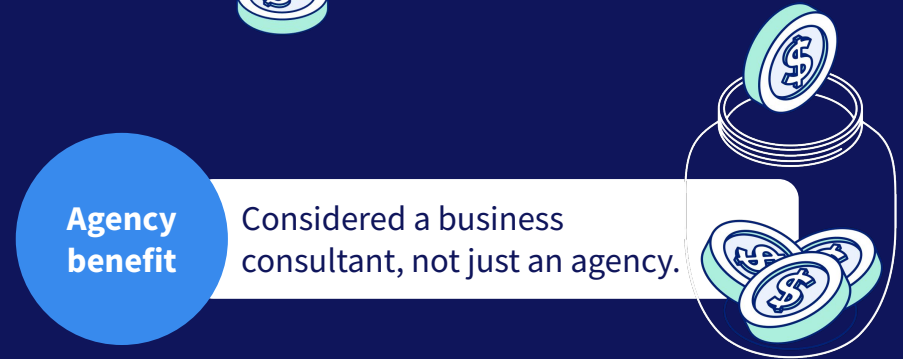
New Products or Services

- Consider expanding offerings
- Explore referral relationships



Narrowing Marketing Focus

- Negate keywords from marketing
- Tailor business descriptions to clarify business focus



How AI-mined gold from calls can transform your business

AI mines conversation insights you can use for...



Lead Conversion

- Best leads from your best marketing sources
- Automated workflows for lead follow-up
- Complete context on leads, recommended next steps to convert



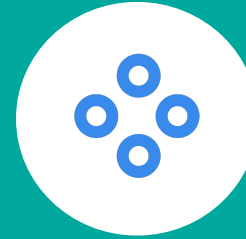
Customer Experience

- Full picture of lead journey and interactions
- Relevant, personalized interactions with customers
- Swift follow-up



Agent Performance

- Coaching tips on call handling
- Aggregated insights across calls or by agent
- Patterns or trends in positive or negative sentiment



Marketing Optimization

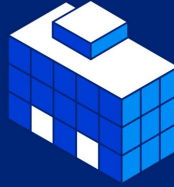
- AI-powered insights across CRM, MA and other systems
- Complete picture of lead journey and outcomes (digital, offline)
- Better lead quality and marketing ROI

What it means for you



Marketer

- Ensure that leads are properly handled
- Respond to claims of low lead quality
- Gather VOC insights at your fingertips



Agency

- Stay close to your client and customers
- Identify patterns in performance across channels, campaigns, locations
- Position yourself as a consultant / trusted partner

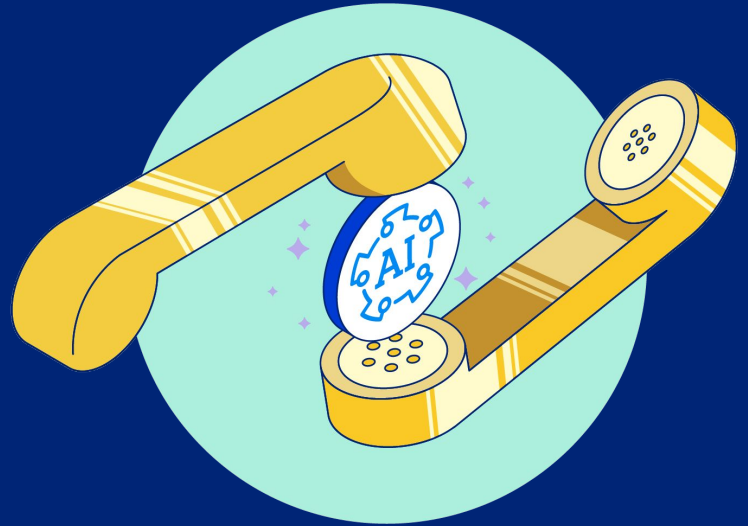


Business Owner

- Gain first hand knowledge of what customers (and agents are saying)
- Selectively drill down into areas requiring attention
- Elevate your focus on strategic matters versus being in the weeds

AI-mined insights make your business more *human*

AI doesn't need to replace customer conversations — the insights it mines makes them more meaningful and productive.

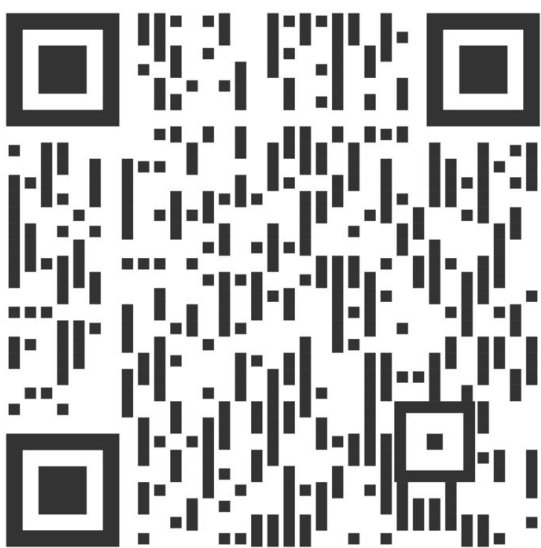


Questions you should ask...

- Do you think you're attracting good leads, but results aren't showing it?
- Do you have an accurate view of how agents handle calls?
- Does your lead follow-up address the real needs customers articulate in calls?
- What could you do with voice-of-customer insights summarized across calls?



Check out exclusive INBOUND downloads



CallRail

What 100m phone calls reveal about data-driven marketing



Your conversations are a goldmine of untapped insights. Use AI to unearth them.

The days of simply picking up the phone, chatting with a lead, and perhaps taking some notes (if you have a notebook handy) are over.

Smart businesses have long realized that conversations provide some of the richest insights you can get anywhere about consumer needs and intent.

Conversation data could improve...



Lead Conversion

Get clarity on your leads, track their behavior, and close more deals faster.



Customer Satisfaction

Use robust sentiment analysis to identify customer needs and reward any agent really trying to pick up the slack.



Agent Performance

Ready to identify your top performers, provide better coaching, and reward your best agents?



Marketing Optimization

Use data to optimize your campaigns, track the ROI of your marketing, and make data-driven decisions.

AI-mined insights make your business more human.

AI search helps surface conversations – the insights it mines makes them more meaningful and prescriptive.

I think I'm attracting good leads, but results aren't showing it...

My view of how agents are handling calls is murky...

I don't have time to personalize follow-up actions based on my leads' intent...

I have no insight into conversation trends across all of my calls...



CallRail Ready to mine the data gold in your conversations?

CallRail Conversation Intelligence™ is the leading AI for business, small and large, to mine their conversations for data-driven marketing optimization insights.

Try it FREE at callrail.com

Hey CMO!

Want to inspire confidence in your marketing strategies?



Know definitively which of your marketing dollars is making your phone ring with CallRail. CallRail's Call Tracking lets you track calls, texts, forms, and chats as easily as you track clicks. Get the metrics you need to spend smarter on everything from paid search to print ads in one easy, powerful dashboard.

Get the full picture of your marketing ROI

1 Achieve a more accurate CPA by tracking traditional channels

With CallRail, you don't need to guess which marketing campaigns are driving calls to your business. Call Tracking lets you measure previously untrackable marketing sources like calls and texts so your CPA data isn't limited to digital channels.

2 Complete the picture of your lead and customer profiles

Your central source of truth – your data warehouse – contains all the information about your leads' and customers' online interactions with your business. Using CallRail's API, you can add call tracking into the mix and leverage customer conversation data to help inform critical business decisions.

3 Make marketing experiments less risky

It can be difficult to get immediate results from traditional marketing experiments like mailers and out-of-home ads. With Call Tracking, however, data starts rolling in as soon as your phone rings – providing instantaneous results that allow you to optimize early or pivot when needed.

CallRail

Visit callrail.com/signup for a 14-day free trial.



Hey Agency Marketer!

Want to inspire confidence in your marketing strategies?



Know definitively which of your marketing dollars is making your clients' phones ring with CallRail. CallRail's Call Tracking lets you track calls, texts, forms, and chats as easily as you track clicks. Get the metrics you need to spend smarter and improve client ROI – on everything from paid search to print ads – in one easy, powerful dashboard.

Know which marketing dollars make your clients' phones ring with Call Tracking

1 Optimize campaign spend

CallRail helps you lay the foundation for successful, sticky client relationships by ensuring you don't waste another penny on underperforming campaigns. Track, optimize, and prove campaign ROI when you can easily see which channels generate the most high-quality leads.

2 Deliver a personal touch, at scale

Tailor every lead's experience with personalized call routing, hold messaging, and other automations based on their campaign source. By surfacing opportunities that improve your clients' conversion rates, your agency will become much more than a line item in the budget – you'll be an indispensable partner.

3 Bring in more of your clients' best leads

Illuminate the patterns and needs of the highest-value customers by tapping into automatic conversation analysis and lead scoring. Don't guess what your clients' best customers need – hear it straight from them, in their own words, when you uncover the insights hidden in customer conversation data.

CallRail

Visit callrail.com/signup for a 14-day free trial.



SPECIAL INBOUND OFFER: 20% off Conversation Intelligence®

Visit the CallRail
Conversation Station for
your chance to win

SAMSUNG

The FRAME TV





thx.