

# Everything You Should Be Doing Before You Start Call Tracking

# Welcome to the first guide from a company where the goal is to tell you NOT TO BUY our product.

## At least not yet.

Purchasing software before you're ready is like buying a motorcycle before getting your license. It looks great, but you're not going anywhere for a while. As much as we want you to be our customer, we'd much rather you be a customer who can get real value out of call tracking. And to get real value, there are some things to make sure you have settled first.

**Who are you marketing to?**

**Where are you marketing?**

**How do you measure your marketing?**

**How does marketing communicate with internal teams?**

If those questions are all taken care of, [head on over to our pricing page](#) to take your marketing to the next level. Everyone else, let's work together on how to answer these questions.

### Assumptions We'll Be Making!

*We trust you have some key things settled:*

- You have (or are a part of) a business.
- That business has a website.
- You also have a mission, vision, and values.

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## STEP 1

# □ Define your audience.

A marketing strategy and a pre-call tracking strategy both start in the same place: defining who you're marketing to.

Good marketers know their audience like they know their best friends. How they talk, what they're interested in, what makes them happy, and what makes them frustrated. You might have fewer inside jokes with your customers than your BFF, but the connection needs to be there.

Two incredibly important pieces of your marketing strategy to help (1) visualize and (2) codify that connection are your:

## **Ideal Customer Profile (ICP): the things that all your best customers have in common.**

For B2B, this is organization-level characteristics like employee count, revenue, or tech stack.



## **Buyer personas: Distinct, individual profiles within your ICP describing the hypothetical people who would be buying your offering.**

What motivates them, their role in the buying process, and more descriptors to bring them to life.

You put these together with insights pulled from analytics, surveys, and internal expertise. Both ICPs and personas are living documents needing regular review as you learn more about your audience.

## STEP 2

## □ Build out your core marketing mix.

Ok, you know who you're marketing to. Where are they? Wherever they are, that's where you need to be too. Not physically, of course, (unless cool experiential pop-ups are your thing!), but through advertising. The channels you choose will have a big impact on your success, regardless of the stage your company is in.

At the heart of call tracking is taking your marketing mix and optimizing it to make each of your ad dollars more effective. Until you have key channels up and running, there's not a lot to optimize.

### The marketing mix starter pack:



Now that you're actively spending money on advertising, and hiring resources to maintain a robust inbound strategy, it's probably a good idea to measure if any of it is working.

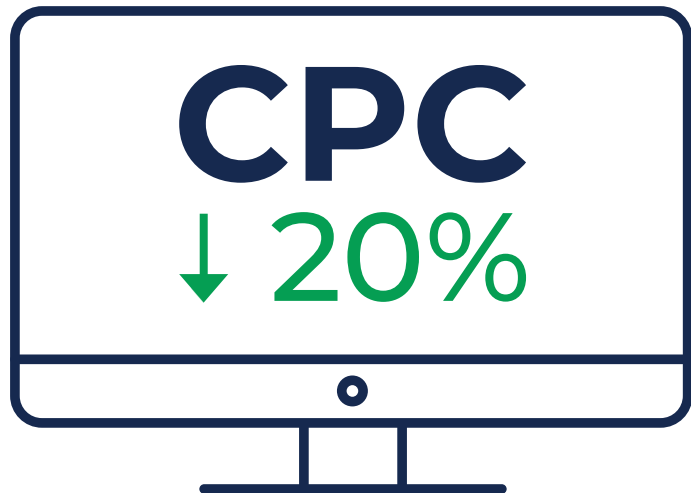
## STEP 3

## □ Design a basic measurement strategy.

There are two big umbrellas of measurement to attack right away: channel-specific and roll-up reporting. Both are equally important. You need to know how individual ads and platforms are performing, but you also need to know how each of those impacts larger business results.

All your ad platforms will provide some key performance indicators (KPIs). Without doing any planning at all, you can get reports on:

- How much you're spending
- How many clicks you're getting
- How many times your ad has been seen
- And how all three interact, like click-through rate (CTR) (clicks/impressions) or cost-per-click (CPC).



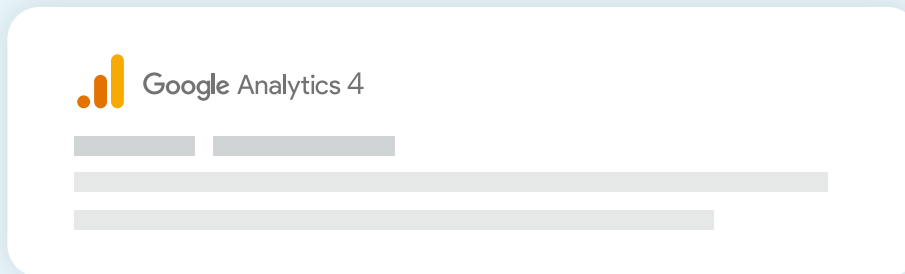
These are great places to start. You can look at which ads are driving the most clicks, the cheapest clicks, or the most impressions and start to make choices on what to optimize. But the performance story on ad platforms, without a little more effort, stops in the ad platform. What happens to those people who clicked or saw your ad?

The foundation of marketing analytics and measurement revolves around your website. Ads point people to your site. Search engines point people to your site. Even word of mouth generally points people to your site. [Knowing how your site visitors got there](#) is job number one of basic attribution.

**“The performance story on ad platforms, without a little more effort, stops in the ad platform.”**

## A simple, all-online approach to measurement:

1. Use Google Analytics' default channels, e.g., paid search, organic search, referral, display.



- **PROS:** Simple, requires zero setup beyond putting the GA4 code on your site.
- **CONS:** As you scale, there may not be enough specificity to make informed decisions.

2. Layer on custom UTM parameters, e.g., utm\_campaign, utm\_content, utm\_term.

example.com?utm\_source=ctm&utm\_medium=ebook&utm\_campaign=calltracking&utm\_content=params

- **PROS:** Provides a higher level of specificity for drill-down reporting and you can roll up reporting across multiple channels from the same campaign.
- **CONS:** Limited to online interactions where you control the URL being used.

3. Vanity URLs for traditional advertising, i.e., a print ad that redirects to a campaign landing page.

example.com/free

- **PROS:** Able to track the effectiveness of individual offline ads or campaigns
- **CONS:** URLs can become long and cumbersome, and if it's not easy to remember you could lose tracking.

Despite the cons listed above, these three pieces can come together to form a very solid measurement foundation where you can track not only specific ads, but also higher-level campaign initiatives across channels.

## STEP 4

# □ Stand up a foundational tech stack.

Why spend money on software at all? The tools you'll use are designed to make teams more efficient, so you can spend more time on data analysis and less time on data entry. A foundational tech stack doesn't need to solve all your problems. At a minimum, you'll want tools to help you **attract**, **nurture**, and **close** leads.

1

## Attract

- Google Ads and your other advertising platforms
- A content management system, like WordPress, for easy content strategy implementation
- SEO research and implementation tools, like Semrush, Yoast, and Ahrefs
- Forms and landing pages to capture leads, like Unbounce, Instapage, Gravity Forms, and Jotform

2

## Nurture

- A CRM for both marketing and sales, like HubSpot or Salesforce
- An email marketing tool, either built into your CRM or a stand-alone like Mailchimp

3

## Close

- Live lead qualification and sales through chat bots, like Drift
- Easy scheduling through Google Calendar or a tool like Calendly
- A business phone system and video provider like Zoom

# Why you can't stop there.

If all that you do is those four things above, your marketing team is going to be in pretty good shape. Unfortunately, it's very likely your competition is also in pretty good shape, which means you need to find something to take your team from good to great.

**You're now ready to add call tracking to your marketing strategy. And we're ready to tell you why.**

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## YOUR FOUNDATION:

- ☒ Define your audience
- ☒ Build a core marketing mix
- ☒ Design a basic measurement strategy
- ☒ Determine a foundational tech stack

## WITH CALL TRACKING YOU CAN:

- ☐ Know your audience better
- ☐ Optimize your ideal marketing mix
- ☐ Fill the gaps in your measurement strategy
- ☐ Enhance your tech stack

# Know your audience better.

You've defined your audience, now it's time to really get to know them.

The number one way to get to know someone, whether it's your first date, 20th year of marriage, or a B2B customer relationship is... *to listen*.

Most marketing teams aren't spending their day-to-day talking to customers. Any firsthand communication typically takes the form of a survey or focus group. Definitely add those things to your approach. In between expensive focus groups and targeted surveys is call tracking, which gives you the opportunity to regularly listen to prospects and customers.

**Call recordings** offer an on-demand library of audience insight. That's real first-party data, not reliant on cookies and complicated tracking to collect. Just the voice of your customer, and your internal teams, in easily-accessible audio. Spend some time manually listening and learning how your audience speaks, what kinds of questions they ask, and how your sales team responds to those questions.

## Use recordings to inform:

- SEO keyword research and strategy
- Relevance of your paid ads
- Sales enablement opportunities

**Call transcriptions** are the next layer of unlocking insights from your audience. The written version of conversations allows you to spend more time analyzing and reviewing. And, transcriptions give you the power to start finding commonalities within your audience so you can define smaller segments. With keyword spotting, you can do things like define an automated trigger to tag every caller by a product they reference in the call, or something as simple as differentiate between callers who ask about price and those who don't.

**Artificial intelligence** allows you to put all of that analysis (manual and automated) into high gear. Combined with call transcriptions, chat, and text transcripts, AI can start pulling advanced insights after every interaction without anyone on your team needing to lift a finger. You set up prompts. The AI answers them. Let AI define crucial data points like:

- Was the person ready to buy?
- Did they schedule a demo?
- Was it a qualified call?
- What's the next best step for following up?

[AskAI from CallTrackingMetrics](#) lets you define your prompts to pull out audience insights your marketing and sales teams care about—not what your call tracking company decides is important for AI to answer. Get insights, and fuel engagement, by combining AI outputs with custom fields and automated actions.



## Optimize your ideal marketing mix.

After you have a strong marketing mix built, you need to make sure you're spending your budget in the right places.

You can start with simple online attribution from Google Analytics and the UTM parameter strategy, but to take it a step further than your competition you'll want to start attributing offline conversions as well.



How does attribution help make better marketing mix decisions? [Keep Reading](#)

You've built your mix to match where your audience is. With call tracking, you can start optimizing your mix based on where your most valuable audience is. Practically, this means moving from making choices based on clicks and website activity to making choices based on lead activity across all your channels.

Call tracking allows you to accurately report on leads from calls, texts, chats, and forms and tie them to actual business outcomes. With a full picture of where leads are coming from, and which ones are converting into paying customers, you can move your efforts toward the highest-value customers and away from those who aren't converting.

# Fill the gaps in your measurement strategy.

You're using UTM parameters, enabling auto-tagging on your Google Ads, and even peppering in some vanity URLs to capture almost all of your ad's results.

Call tracking adds a couple more tools into your measurement tool kit to fully complete your approach:

## Tracking Numbers

A tracking number is a phone number. There's nothing magic about a tracking number, but it'll make you feel like it might be. You unlock the magic by tying a tracking number to its marketing source: a campaign, an ad, or maybe a social media profile. So when a call comes in on that number, you know exactly where it came from. And because numbers are relatively inexpensive, you can create a strategy to accommodate the level of granularity you want in your reporting.

- Use one number to match calls to billboards in Minnesota.
- Use two numbers to match calls to billboards in Minneapolis or St. Paul.
- Use 20 numbers to match calls to the individual billboard locations.

Of course, if your marketing mix is primarily digital ads pointing to your site and landing pages, tracking numbers take on a whole new level of magic known as dynamic number insertion (DNI). Instead of putting a number on a physical billboard, tracking numbers get swapped into your site based on where they came from.

Someone coming from Google Ads will see a different number than someone coming from organic search. It's the same concept as the billboards, but done behind the scenes, in real-time, as users visit your site. This is why it's important to have your UTMs and vanity URLs settled, because each can be used to trigger when a number swaps.



## Tracking Sources

A tracking source is a bucket of similar tracking numbers, used to easily identify how your different channels are performing. A tracking source could contain one tracking number, like “LinkedIn Page” containing the number used in your LinkedIn profile. Or, it could be a larger bucket like “Social media profiles” that contains numbers used across multiple platforms but serves the same goal. You’ll want to set your own tracking sources to answer the questions that arise the most.

You could set up all online visitors into a “Website” bucket, if the most-asked question of your reporting is “how many calls came from our site this week?” But, more likely, you’ll want to report on specific campaigns, sources, or ads needing their own tracking sources.

### CALLTRACKINGMETRICS PEEK BEHIND THE CURTAIN:

We use tracking sources to measure at the channel level, e.g. tracking sources for Google Ads, Microsoft Advertising, Google organic, referrals, etc. This allows us to monitor and report on channel performance, and then drill down to the ad and keyword level in advanced reporting.

CallTrackingMetrics

Account - CallTrackingMetrics  
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CallTrackingMetrics

Tracking Sources

Advertising channels you want to track, such as Facebook or Google Organic

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# Enhance your tech stack.

You spent time finding and spending good money on your technology to attract, nurture, and close your leads. The last thing you want is to purchase another tool that comes in and requires you to change everything you're already doing.

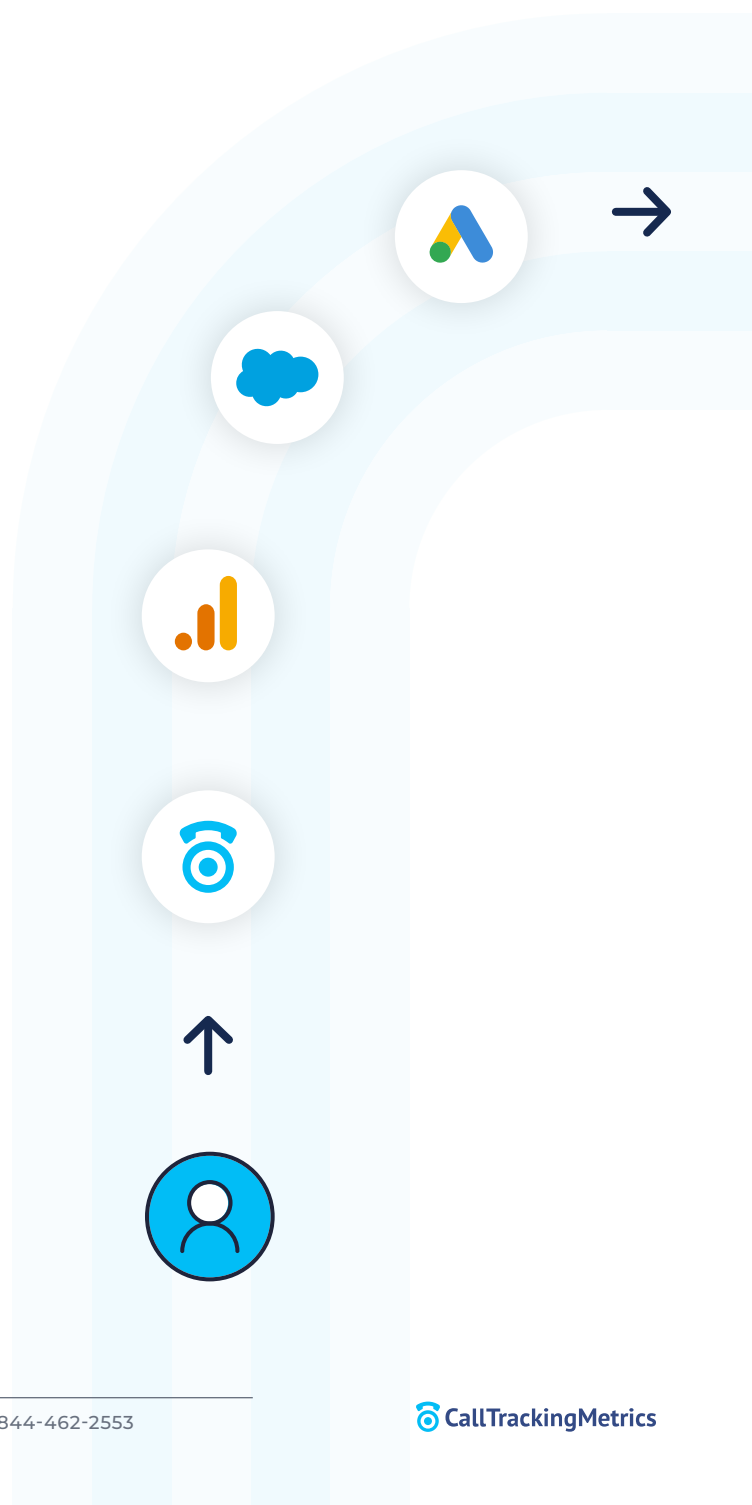
A good call tracking solution does the opposite and only makes the tools you're using better. It adds data and insights where you need them and has the tools to help automate and make your marketing and sales more efficient.

## Attract:

Advertising platforms like Google Ads continue to build out increasingly sophisticated functionality to automatically optimize campaigns to your desired outcomes. You tell it what a lead looks like, and it goes after more of the same. It's completely reliant on your data to inform those choices.

Call tracking delivers a way to sync only your highest value leads into platforms like Google Ads so they can go after leads that will turn into revenue instead of filling your sales pipeline with unqualified leads unlikely to ever buy. How?

- **SCORING** - Automate, or manually select, scores for leads as they come in. At the end of a call an agent can score a call on a scale of one to five stars and/or mark it converted with an associated value.
- **INTEGRATIONS** - Sync only the best calls back to your ads platforms like Google Ads and include the actual values so their smart bidding can go to work to maximize the return on your ads.
- **LISTS** - Create and export lists based on automated tags, scores, or other criteria for inclusion or exclusion in your ad campaigns to better personalize your marketing to narrowly defined segments.



## Nurture:

CRMs contain a ton of great information about your prospects and customers and a way to track communication you've had with each. Like everything else we've touched on, call tracking allows you to get an even more complete picture of your customers.

You can map any available data point in CallTrackingMetrics to your CRM. The tracking source to verify where your contact came from, additional contact information like phone number you might not have gotten from a form fill, or even AI-derived insights from a custom field.

On top of those data points, [integrations between CRMs and call tracking software](#) allow you to layer on call activity on top of email activities and sales tasks your teams are already leveraging. And with a tool like CallTrackingMetrics, not only is the call logged, but you can listen to those calls directly in HubSpot or Salesforce.

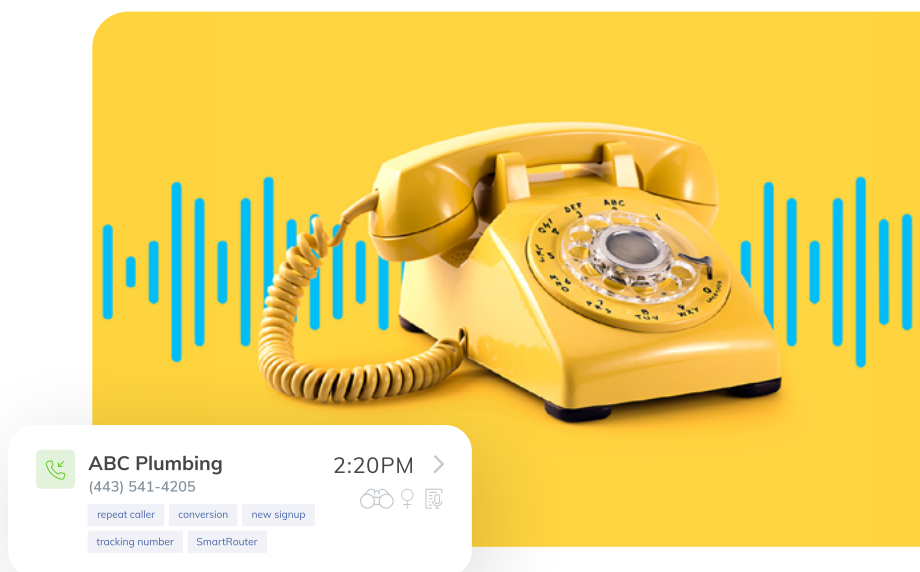
## Close:

Call tracking is a bit of a misnomer. A tool like CallTrackingMetrics goes so far beyond the traditional definition of call tracking, which usually stops at tracking numbers and DNI. You can optimize your close rates and speed to lead with call management tools.

- **Call forwarding** for simple use cases like sales teams on their cell phones.
- **Advanced routing** rules based on geographic location, weights and skills of your sales team to get callers to the right team, fast.
- **Queues** and **automated callbacks** to minimize wait times for your prospects.
- Coaching tools like **live listen**, **call scripts**, and **real-time reporting** to keep improving team performance.

## Bonus:

You can stop paying for the business phone system you purchased before being ready for call tracking. The CallTrackingMetrics softphone, robust routing features, and inbound/outbound omnichannel tools across calls, texts, chats, and forms can replace and enhance your phone system.



# Timing is Everything

At the end of the day, you can sign up for call tracking at any time and there will be value to be found. It's a powerful way to start maximizing how you spend your advertising budget. But there's so much more to call tracking that's difficult to navigate without the surrounding pieces to benefit from it.

You need to define your audience before you can **reach them better**.

You need to have a marketing mix before you can **optimize it**.

You need to have a measurement strategy in place before you can **fill its gaps**.

And you need to be using tools before you can **enhance them with additional insights**.

Call tracking is a core tool of great marketers. It makes every stage of the buyer's journey more effective and efficient. But, the first step to being a great marketer is building a good foundation.



To learn more about CallTrackingMetrics,  
request a custom product demo today.

[Book a Demo](#)

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