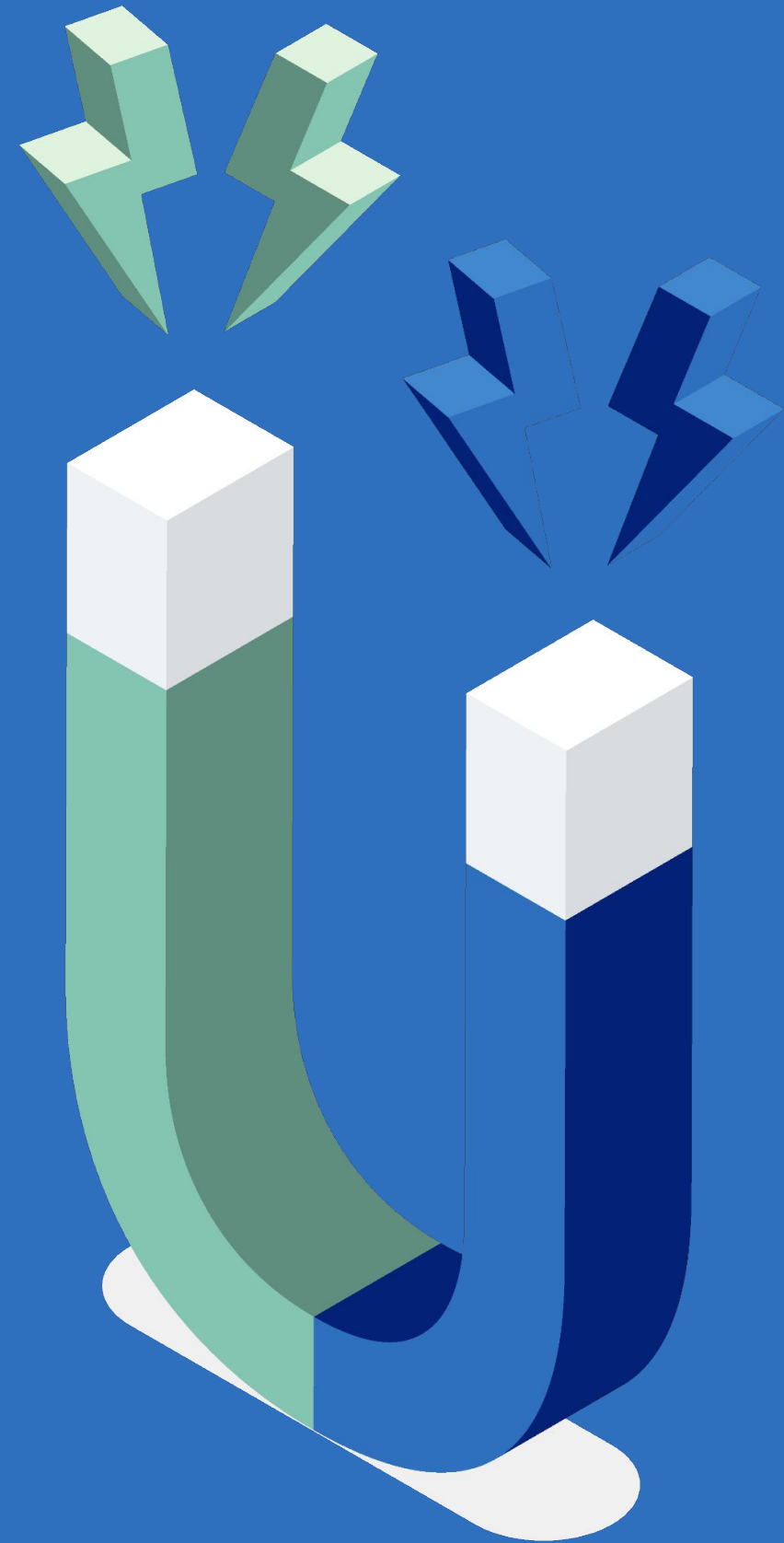


CallRail

The Agency Marketer's Guide to Client Retention



Overview

In today's competitive agency landscape, it's more difficult than ever to stand out from the crowd and retain clients. As AdWeek reports, it's not uncommon for small-to-medium-sized firms to see upwards of 40 percent client turnover year over year.

Too much client churn can be a deathblow to your agency, since it costs up to 4 times as much to earn a new client as to retain an existing one. And as AdWeek's report explains, a consistently high rate of churn indicates that your agency is failing to establish long-term relationships with your customers. This can seriously stunt your agency's growth, since recurring client revenue is so foundational.

In this e-book, you'll learn how to improve agency client retention by:

- Figuring out why clients are leaving
- Implementing marketing best practices for your agency
- Learning how to use data-driven marketing to better retain clients
- Seeing how call tracking can make your agency stand out

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1

Why Clients Break Up With Their Agencies

The agency-client partnership is like any relationship. In the beginning, your agency is in the courtship phase with a potential client. You want to show why you're the best and convince them you're the agency they need, ensuring long-term client retention. Some potential clients are already taken, others just aren't interested, and some decide your agency is exactly what they want. Score.

So, you won the client you've been wooing for weeks (or months). Now, the real fun begins. There's a ton of new ideas you and the client have, and everyone is excited about what's to come. However, in the midst of the work, frustrations begin to peak. The client isn't responding to your outreach like they used to, or feels you aren't really listening to them.

What initially began as an enthusiastic partnership is now flooded with professional petty bickering that seems to always begin with, "Per my last email..." You're trying your best to get the job done, but things just aren't working out. Why?

As agencies work to enhance their focus on client retention strategies, taking the time to reflect on why clients churn is necessary.

“For us, [call tracking] was a critical part of our mission, because we want to be able to accurately track all sources of contact for our clients. And we found that for most of our clients, they were tracking form fills and web sessions and everything else, but not calls.”

– Joe Khoei, Founder and CEO of SalesX



Poor Communication

Clear and concise agency-client communication—at all times—is a must. If you're noticing poor communication, this may be an indicator of underlying issues.

Maybe there's a misunderstanding between you and your client about the direction of a current campaign. Perhaps the client wants to understand more about your agency's processes and how results are achieved. Or, you aren't getting the feedback you need from your client to progress. Regardless of the specifics, miscommunication could send your client running to a competitor.

Like any relationship, combatting communication problems starts at the beginning:

- Set realistic expectations for you and the client.
- Create a detailed plan that proves you understand your client's pain points.
- Incorporate tangible action items and goals that will be accomplished throughout various stages of your plan. (Asana is a great tool to help with this.)
- Address the best way for you and your client to present questions, concerns, and constructive criticism.
- Actively communicate with your client on a regular basis as you carry out the plan and get those results.

In every relationship, no matter what problems you're facing, at some point you have to talk about it. It won't always be easy, but it could help ensure long-term client retention.



You're Broke

Alright, maybe you're not totally broke. But money is extremely tight and your client is starting to realize it. This is a huge red flag for a client—if they feel like your agency is struggling financially, it's only a matter of time before they start talking with an agency they feel is more financially secure.

Money problems can result in a serious lack of focus by your team, because it's almost impossible to do your best work if you're worried about keeping a business afloat. Struggling to manage basic tasks because you're stretched too thin financially is not a situation you want to be in.

If things get too dire, you could end up desperate and trying to penny-pinch for every little service. Or worse, having to let go of employees who helped establish and grow relationships with your clients—either of these problems could be a breaking point when it comes to client retention.

Healthy finances are a hard, non-negotiable item. Establish a strong financial foundation and make informed financial decisions for you and your client's future.



Lack of Results

One of the best ways to defeat churn rate and improve client retention is showing your client real results. Your overall goal shouldn't be to promote brand awareness, increase web traffic, or even boost customer conversions—it should be to prove your worth to clients.

Agencies are constantly struggling to find the best way to show how their work has a positive impact on a client's business. If your client can't concretely see that you're contributing effective results, why should they stay? They'll realize there's no value in the relationship.



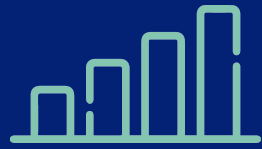
It's Not You, It's Them

Every agency has at least one former client they don't miss. (They're the professional equivalent of your crazy ex.) This client made everything about working together beyond difficult. From the beginning you may have felt the client could be problematic, but you dismissed it because you felt that it was worth the challenge.

You were wrong.

Clients that create unnecessary problems for you and your team are an epic fail. If it takes longer to accomplish tasks because of their difficult demeanor, this is ultimately a loss for your agency. And allocating too much time and too many resources toward the wrong client can mean you're depriving another client of the care and attention they need.

Don't overexert yourself for clients like this. Agencies will try to make it work with toxic clients for tons of reasons, but if you end up bleeding time and resources, you'll eventually realize they're not worth it. And no matter how hard you work to please an unsatisfiable client, they're most likely going to end up churning anyway. Take initiative and recognize when a client simply isn't a good fit—you deserve better anyway.



They've Outgrown You

This is a difficult realization to confront, but it happens: Your client has reached the point where they're independently able to fulfill their own marketing needs. It's unfortunate for you, but this doesn't have to be a complete loss.

If your client is cutting ties because they've outgrown your agency, use this opportunity to establish a referral partnership. They might not need you anymore, but there's plenty of other prospects that will. Ask them if you can use their growth as an example to create a compelling customer testimonial.

This is fundamentally different from the other types of agency breakups we've mentioned, so it doesn't have to end negatively. It's all about perspective—you can view it as losing a client, or as gaining an ally that can help bring in new clients. There's nothing wrong with being friends after the breakup.

Pinpointing why a client left can help your agency develop client retention ideas. But first, you have to take the time to thoroughly assess your client breakups. Reducing churn requires analyzing what you've done in the past to enhance what you'll do in the future. And like any breakup, closure is best achieved through reflection.

But what's an agency to do once they figure out why their clients churn? Most of the time, the answer lies with data-driven marketing.

2

The Solution

You can combat client churn from two angles. On the one hand, you need to make sure your agency has its own marketing ducks in a row so you get off on the right foot with new clients. On the other, you must strategically employ data-driven marketing to truly prove your value and give your clients plenty of reasons to keep you around for the long haul.

Part 1: Get Your Agency Marketing On Point

Even in the best of times, agency marketing can be like performing a delicate dance. You've got to make sure you're meeting deadlines and coming in on-budget, while balancing the needs of your clients against your own long-term business goals. You need to know when to turn on a dime and change up your approach, but also when to double down on a winning strategy—all of these factors (and more) will inform the creation of your own unique agency marketing best practices.

So with all of these variables to keep track of, it can be tough to figure out exactly what separates 'good enough' agency marketing from the very best of the best. There's no magic bullet or secret sauce for successful agency marketing, but there are some highly effective techniques and best practices any firm can apply to maximize their reach, and bring in more clients and leads.

Let's review some surefire ways your agency can improve your marketing, earn more new business, and retain more clients.

1

Set the right expectations with a marketing SLA

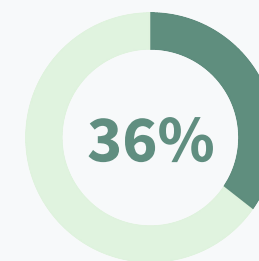
One of the most critical tasks in any agency-client relationship is setting the proper expectations for the kinds of services your firm will provide. Misaligned expectations can have serious repercussions for your business—the client’s hurt feelings might lead to them taking their business elsewhere, and the resulting negative word-of-mouth can impact your standing with current and prospective clients alike.

The best way to head off these problems before they begin is with the proactive implementation of a Service Level Agreement (SLA), a contract between firm and client that specifies in clear detail the services you will provide. Though these types of contracts were previously associated with service providers—like IT companies, insurance agencies, and telecoms—they have become increasingly common among agencies and marketers for the peace of mind they bring clients.

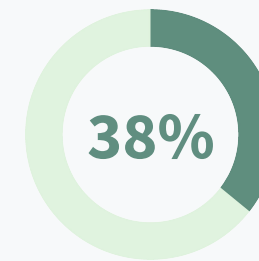
At a minimum, a good SLA will contain an itemized list of the services your firm will provide the client, well-defined performance targets for your agency to meet, backup strategies or penalties if those targets are not met, clear deadlines for time-sensitive projects or campaigns, and dedicated hours during which your clients can contact you.

And there’s a very good reason why your business should make this extra effort: HubSpot reported in 2017 how companies that implement SLAs with their clients see a 36 percent increase in customer retention and 38 percent more sales, compared to firms that do not. So if you haven’t implemented SLAs yet—especially for your bigger clients—there’s no time like the present to get started.

After SLA implementation with clients



Increase in Customer Retention



Increase in Sales



“The key is to set realistic customer expectations, and then not to just meet them, but to exceed them—preferably in unexpected and helpful ways.”

– Richard Branson

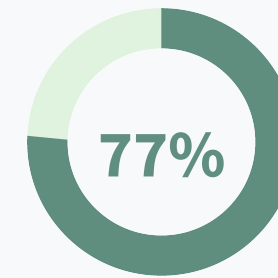
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Implement a comprehensive lead scoring system

Experienced agencies know that good marketing isn't just about bringing in a high volume of new leads and prospects. Equally important is making sure that quality leads—those most likely to convert—are coming in and then promptly being passed along to your sales team.

That's why it's mission-critical for your agency to implement a lead scoring system for your clients. Lead scoring will look different depending on your field or industry, but there are still some universal ground rules:

- 1 Define the behavioral and demographic attributes of an ideal lead (their income, how old they are, where they live, etc.)
- 2 Build a scoring framework and create a formula that numerically quantifies a lead's rating, based on your marketing attribution data
- 3 Document your lead-scoring system and ensure it's fully integrated within your SLA



By filtering out bad or unresponsive leads, a scoring system can yield immediate and quantifiable results for your agency, allowing your sales reps to focus their time and energy on the prospects that are most likely to convert or become repeat customers. Agencies that use a lead scoring system see a **77 percent increase in ROI** over firms that do not, as MarketingSherpa reported.

There are even solutions that can automatically analyze, score, and sort inbound leads. Recent advancements in AI and machine learning (like CallRail's own Conversation Intelligence features) can enable agencies and firms to score leads with minimal human input, allowing teams to focus on boosting conversions and ROI.

More leads and conversions mean more happy clients, which means more repeat business and better word-of-mouth for your marketing agency.

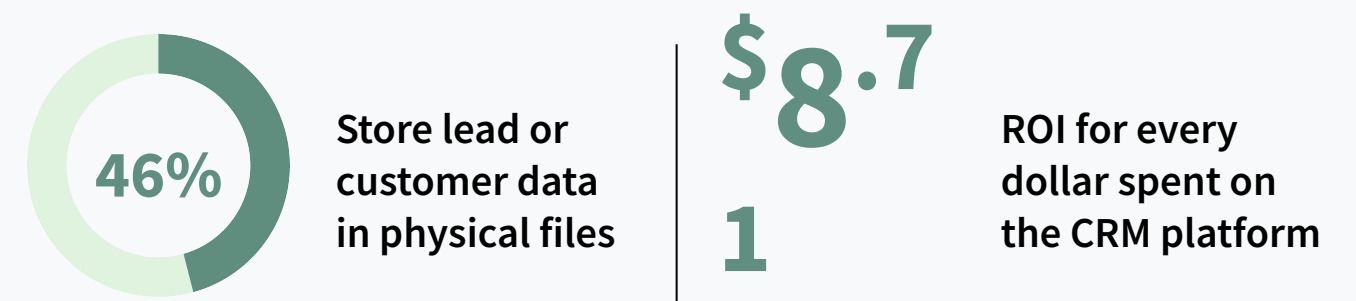
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Choose a CRM that's right for your marketing agency

Once your agency graduates out of the mom-and-pop phase and starts catering to more than a handful of clients, it's time to implement Customer Relationship Management (CRM) software. CRMs like **Salesforce**, **HubSpot**, and **Marketo** are centralized databases used by businesses to store contact information, account data, leads, and other sales opportunities. Proper implementation of a CRM across your sales, marketing, and customer service teams will help streamline and automate the sales process, maximizing ROI and profits.

For mid-sized firms, a CRM helps centralize your customer data for easy access across multiple teams and devices, which is an invaluable competitive advantage as your business scales and grows. And for larger enterprise businesses, the sophistication of modern CRMs can perform advanced tasks like sending personalized emails, gathering data and insights from social channels, and providing a top-level view of how your marketing is performing.

An estimated 46 percent of sales teams store lead or customer data in physical files, a serious security risk that can likewise reduce your efficiency. There are likewise a vast array of eye-popping statistics that support the notion that CRMs are good for business: They provide an average of US \$8.71 in ROI for every dollar spent on the CRM platform; CRMs can increase per-salesperson revenue by up to 41 percent; CRMs improve customer retention by up to 26 percent.



All that said, there's usually a somewhat steep up-front cost to using a CRM, which might scare away smaller or mid-sized agencies. Fortunately, most of the major CRMs offer some kind of no-obligation trial so you can do some testing to see if their solution is right for you.

If you're serious about growing your business, it's well worth your time to bite the cost of a CRM for the efficiency and peace of mind it will bring.

5

Develop an agency referral program or partnership system

At its core, agency marketing is a relationship business—your firm is only as strong or lucrative as the bonds you’ve cultivated with your clients. Word-of-mouth can make or break your business, and forging meaningful relationships with new clients is every bit as important as strengthening ties with existing customers.

One of the best ways to both bring in new business and deepen your existing relationships is through a referral program, where current partners receive a one-off lump sum (or smaller ongoing commission) for directing new clients to your agency. Not only will this bring new business your way, you’ll also incentivize the clients making the referrals to stick around as long as possible and reap the full benefits of the partnership.

This is an agency marketing best practice that should be a top priority for your business, because referred customers can generate real revenue—at least 16 percent more than non-referred clients.

So if you don’t already have a system for partnerships in place, you can start by meeting with a trustworthy (and preferably local) client and laying out the terms of a mutually beneficial referral program. Once your referral program is up-and-running, you’ll be amazed at how much new business it can bring in.



A brief aside on the elephant in the room: Referral discounts

We often hear from marketing agency operations teams that referral discounts are not an option for professional services. Since these services have a higher price point, longer sales cycle, and are generally more complicated in execution, referral discounts seem both inappropriate and not cost-effective.

But you could easily make the case that neither of those preconceptions are true. For one, there aren't many reasons why a happy client would be opposed to discounts or freebies—if you're doing quality work with them, they'll genuinely want to refer you to their friends anyway, and a bonus or discount is just a cherry on top.

That said, if you have a strained relationship with the client, they'll likely see a referral discount as pandering and disingenuous. Be selective about who you offer referral discounts to, but also ensure you provide consistent service that makes all your clients happy enough to refer you to their peers on their own.

Secondly, a modest but worthwhile discount or bonus is cost-effective in the long run, as long as you price it accordingly and aren't too lenient with the policy. For example, consider offering a 10 percent discount for a month's worth of services for a long-term, low-spend retainer client. (Wait to pay out the discount until the referral becomes a client, since this prevents your clients from abusing the system and also ensures more qualified referrals.)

For larger clients with significant spend, offering a percentage-based discount isn't necessarily cost-effective. In these cases, consider instead offering them a free audit or other one-off service relevant to their needs.

For example, if you handle paid media for a client who would also benefit from your SEO services, offer them a free site audit in exchange for a referral who becomes a client. Aside from earning a new client, you'll also open the door for expanding your relationship with the referring client, too.

6

Link up with complementary businesses for referrals

Company partnerships are a less client-facing method of generating referrals. The key here is to find services you don't offer, and have no plans of offering any time soon (or ever). A simple way to do this is to track service offerings your clients ask for frequently, but not so frequently that your CEO wants to invest resources into making it a full-fledged service offering.

For example, if you run a small agency strictly focused on web development, but you have clients asking for SEO services, you could find an SEO agency partner who doesn't offer web development. In doing so, you open up your pool of potential clients without having to rely on your own clients to do the referring. Plus, your agency partner will do vetting on your behalf to make sure the client is a good fit, which makes for a bit less work on your end.

7

Be selective with your marketing case studies

It can be tempting to crank out case studies for any client that saw positive results with your company, but the most compelling ones come from clients who are well-known, have above-average results, or worked with you on particularly unique projects. (If you're looking for some inspiration on this front, **[check our collection of call tracking case studies.](#)**)

You'll want to highlight how your marketing services not only generated short-term revenue, but also helped set them on a long-term path to marketing success. And, of course, be sure to circulate your case studies on social media and via email.

If you work with large enough brands or operate in a niche market, there's a good chance that the prospects seeing your posts and emails are familiar with the client in the case study. Even better, they may know someone who works there and ask them for more information about your marketing agency.



“The purpose of a business is to create a customer who creates customers”

– Shiv Singh, former VP of Global Brand and Marketing Transformation at Visa

Part 2: Approach Data-driven Marketing The Right Way

It's 2019, and digital marketing isn't all that groundbreaking anymore—especially for agencies. The industry has advanced to a point where if you aren't doing some kind of digital marketing, you're falling behind the times (and your competitors).

But simply offering digital marketing services doesn't cut it either. There are hundreds upon hundreds of marketing agencies in the United States alone, so differentiation is key. But what's an agency to do when it's hard to stand out through just your service offerings? Sure, great brand messaging and a unique approach can help. But at the end of the day, most agencies offer essentially the same range of services.

Your potential clients are no longer going to be impressed by SEO or paid media savvy alone. They need to see real results, and you need to be able to establish trust and prove the value of your work. That's where data-driven marketing comes in: When done right, it can make your agency an indispensable partner to your clients.



What is data-driven marketing?

First, it's important to make sure your clients actually understand what you're talking about. Agency-client communication crumbles when there's too much jargon, so explain things simply and in terms that are relevant to their businesses.

You can start with a simple definition: "Data-driven marketing is an approach that uses analytics to prove your marketing efforts are working, better allocate resources, and find opportunities for growth." From there, you can narrow your definition to better fit the specific industry or work that's most relevant to your client.

In an agency setting, data-driven marketing relies heavily on reporting. While the metrics included in each report will largely depend on the client or the project, here are some rules of thumb worth following:

1

Avoid vanity metrics

As your clients become more in-tune with digital marketing and analytics themselves, they'll become more critical of the data you choose to present to them. (And rightfully so!)

To stay transparent from the get-go, steer clear of vanity metrics. These are metrics that only offer a surface-level analysis of marketing campaigns, and can leave your clients demanding better proof of attribution. Instead, make sure your reports **turn your vanity metrics into actionable metrics** that prove the value of your work.

2

Beef up your presentations

It may be tempting to just put some charts and text boxes in a Powerpoint and call it a day, but well-planned presentations really do make a difference when it comes to winning over key stakeholders. Even the most amazing data findings can easily get buried in a presentation lacking narrative, context, or human-friendly design.

For example, many marketers will gravitate toward the ubiquitous pie chart for their presentations. But depending on what point you are trying to get across, it's important to **choose charts strategically**.

Similarly, if your presentation includes subjective language instead of hard numbers, your key stakeholders won't be impressed. For example, instead of saying "website traffic grew this quarter", say "website traffic increased by 15%" accompanied by the correct graphic.

And of course, there's the little things like color selection that can make a huge difference in how much information your audience retains. This is particularly true if you work with clients from other countries and cultures.

Check out some more data presentation tips to make sure your findings are presented as effectively as possible.



#1: Tell a story with your data

People are more inclined to listen to what you have to say when they feel invested in a structured storyline. It's why we love to watch films, but quickly lose interest when our friends tell a scatterbrained story about "that one time in Vegas."

Use your data to craft a presentation that doesn't just present information, but also guides your client toward a truth or solution for a problem. Use tension strategically to both keep their attention and keep you in control of the room.

#2: Pick a topic and stick to it

Tailor your data visualization choices based on who you're presenting to and what they care about. A money-minded COO, for example, probably doesn't care much about how many impressions your display ad campaign earned, but they'd love to know how many new leads the website earned during and after the campaign.

Choose the metrics that will resonate your audience, and leave out any fluff—it's distracting and will take away from your core message.

Check out more presentation tips at callrail.com/blog/data-presentation-agency-best-practices/

3

Consider all parts of a marketing touchpoint

Calculating ROI is important, but if you want to stand out, consider the other **important parts of a marketing touchpoint**.

You can pretty easily figure out CPC (cost per click) for a search engine marketing campaign. But what about measuring the effectiveness of landing page content? (For metrics, think time on page or bounce rate.)

Including this 'softer' information can help you look past more obvious metrics like CPC, and provide your clients with helpful feedback about what kind of content resonates best with their audience.

4

Build an agency marketing stack tailored around client needs

Tools appear towards the end of this post because they're not a solution in and of themselves. Strategy always comes first, and tool selection comes later, based on what you need to execute your strategy.

It's all too easy for agencies (and clients) to get caught up in the latest and greatest marketing tech trends, but it's important to remember that an ideal tech stack will be tailored to your client's individual needs. Not only is this approach far more efficient, it will demonstrate your agency's credibility and strengthen your client's trust in you.



“Half the money I spend on advertising is wasted; the trouble is I don't know which half.”

—John Wanamaker, early 1900s

5

Explain the problems data-driven marketing helps clients solve

Once your clients have the gist of it, you can start exploring the specific questions that data-driven marketing will help your clients answer. Depending on how well-versed in digital marketing your client is, these questions could be related to general business goals:

- Was our most recent campaign worth the money?
- Where do our most profitable customers find us?
- Do customers prefer to call our business or fill out online lead forms?

Or, they can be specific to certain marketing channels your clients already use:

- Do Facebook or LinkedIn ads generate more long-term revenue?
- Which blog posts are most engaging?
- Do our trade show leads actually turn into revenue?

It can be tempting to use the same presentation with the same examples for all your clients, but tailoring it to each one's individual needs is worth the extra effort—you want your client to see how data-driven marketing applies to their business specifically.

For example, if your client is generating plenty of traffic but struggling with conversion, your agency could explain how the client can use analytics and heat-mapping tools to determine where (and why) users drop off.

6

Use both quantitative AND qualitative marketing data

In data-driven marketing, we tend to get hung up on quantitative ('how many?') data, but qualitative ('why?') data can be equally insightful. In fact, qualitative data can be far more useful than quantitative data when it comes to explaining the numbers you see every day on your marketing analytics dashboard.

For example, consider this [case study](#) with Australian digital agency [Webfirm](#). Initially, they used CallRail to track phone call conversions on the campaigns they ran for their clients, allowing them to increase phone call conversions by 50 percent. But what about the callers who dropped out of the sales funnel entirely?

Webfirm realized that CallRail's **call recording feature** allowed them to find the gaps in their team's expertise that were causing leads to be lost. This qualitative data—used alongside their quantitative analysis—helped Webfirm go above and beyond your average digital agency, proving their value and trustworthiness in the process.

All of these examples show how, when done right, data-driven marketing can elevate your agency to become a trusted partner to your clients. And in today's agency climate, there's nothing more important.

But while you may know the value of data-driven marketing, convincing your clients to focus on the metrics that matter most to their business can be challenging. Fortunately, knowing how to teach your clients which metrics they should pay attention to is a surefire way to earn their trust and drive results.

3

How To Help Your Clients Focus On The Marketing Metrics That Really Matter

There's a debate in the baseball world around one very conventional statistic: Pitcher wins and losses.

For decades, this metric has been considered a key indicator of a pitcher's value. But there's a glaring problem here: A pitcher has no control over his team's offensive output. He could lose a game by a score of 1-0 and he could win a game by a score of 10-9—in other words, earning a win for a performance nine times worse than the game for which he received a mark in the loss column.

In much the same way, when it comes to marketing, many businesses still cling to 'sacred cow' conventional metrics. Maybe your clients are this way—perhaps their previous marketing agency or in-house marketing person was fixated on one of these metrics (like pageviews or raw leads).

How do you get your client to instead pay attention to more meaningful marketing metrics?

1

Clearly, constantly delineate between marketing conversion types

Obviously, conversion types vary greatly in quality. If someone downloads a white paper from your client's website, that's great—you've got another prospect you can nurture.

But it's obviously way more valuable when someone fills out a form requesting a consultation from your client's business. So, if you have any kind of lead-scoring in place for your client, the consultation form will eclipse the white paper download in terms of points ascribed to the conversion.

But what about an inbound phone call to your client's business—one that inquires about pricing, or results in a booked appointment? How does this compare with a form fill?

Getting your clients in the habit of immediately recognizing the difference between conversion types will give them more certainty about the ROI your agency is providing. And being able to put the spotlight on the most valuable conversions you're generating is ultimately better than diluting your reporting by emphasizing high-funnel, low-value conversions.



“The Internet of Things will collect and transmit unprecedented amounts of data. This poses a big problem for marketers, who can end up down a rabbit hole of fruitless information. Now, more than ever, marketers need to be measuring the right things”

— Linda J. Popky, founder of Leverage2Market Associates

2

Don't be afraid of anecdotal proof points to give life to marketing metrics

In some circles, 'anecdotal' may as well begin with a scarlet-colored 'A.' But anecdotes can often be powerful to your clients, who may struggle to grasp quality while sifting through a sterile data set.

When you can storytell—proving that a particular campaign produced a particular customer—your clients are more likely to connect the dots between your agency's work and their growth as a business. Agencies are using CallRail do this every day, and can quickly sort calls by keywords spotted or Call Highlights and send them over to their clients in order to demonstrate the impact of a campaign or sales script they've designed.

3

Get clear (and stay clear) on client business goals

Maybe this is obvious, but “we need a better website” and “we need help with our Google Ads campaigns” are not goals. If you can dive deep with your clients to understand their strategic business goals, your agency will easily provide infinitely more value than you would facelifting a website or re-optimizing Google Ads campaigns. You could also improve client retention, by directly tying your activities to their core business goals.

Here's how that might work.

Let's say your client is an optometrist with three locations around town. And let's say two primary business goals for the upcoming year are increasing booked appointments at their newest (and slowest) office, as well as moving more merchandise across all of their locations.

Working backward from those goals, it wouldn't make too much sense to prioritize pageviews as a KPI. Similarly, it would be odd to report on social media followers to this client, though both of these metrics may very well augment your core efforts.

Let's instead isolate these goals and consider how you might be able to support them.



Goal 1: Increase booked appointments to a particular location

To support this goal, your marketing agency is likely to run some geo-targeted paid advertising on Google and Facebook, focusing on a five- or seven-mile radius around the office you're hoping to boost with more business.

Prospects who click through on these ads might book an appointment through your client's website. And if that's the case, it's obviously important to set up attribution for booked appointments.

Many prospects will probably also call into your client's business after clicking through on one of these paid ads and perusing their website. If so, it will be critical to set up call tracking to make sure you're capturing these prospects, too, and getting credit for them.

When it comes to reporting, you should be able to provide an exact number of booked appointments your paid campaigns produced.

You could also provide a figure for Cost Per Lead by dividing total spend by appointments booked online, plus appointments booked via inbound call. (Pro tip: **You can do this right inside CallRail**, without having to cobble together reports from various sources.)

And, for extra credit, you could further support this client goal by creating an answering script for office staff across all locations that helps them guide callers to the target location, highlighting the schedule openness and, perhaps, its convenient location. You could be sure you were writing something useful by listening to call recordings and browsing the keywords spotted and Call Highlights reports in CallRail.






Goal 2: Sell more merchandise

Selling more merchandise may seem like a difficult goal for a digital marketing agency to support, especially if your optometrist client doesn't have a great e-commerce solution. The simplest way for the business to chip away at this goal is probably through merchandising and sales training for the office staff, and it's likely that neither activity is among your agency's core competencies.

However, your agency is probably already highly familiar with something that will definitely boost sales: Email marketing.

Perhaps your agency could design a new email template for your client's general drip campaign, which includes a 'spectacle highlight.' Or maybe you could set up a campaign which emailed patients exactly one year after their last glasses purchase with messaging that encouraged them to get familiar with new styles before their next appointment. For these activities, you could report on open rates and click-through rates as the KPIs that support the client's particular business goal.

Getting your client to focus on marketing metrics like these, rather than **vanity metrics**, will help to make your agency more indispensable. And effort like this goes a long way towards showing how each activity your agency pursues is not arbitrary, but rather closely tailored to your client's specific goals.

 Email Metrics		 Social Metrics		 Paid Search Metrics	
Vanity	Better	Vanity	Better	Vanity	Better
Bounce Rate	Leads Generated	Retweets/ Shares	Number of Leads	Impressions	Number of Leads
Sharing Stats	Click Through Rate	Friends/ Followers	Closed Details	Ad Position	Cost Per Lead
Open Rate	Cost Per Lead	Number of Posts	Purchasing Behavior	Click Through Rate	Cost Per Acquisition
Deliverability Rat	Lead Quality		Referrals	Cost Per Click	

4

How Real Agencies Use Call Tracking To Go Above And Beyond For Their Clients

So you've streamlined your marketing strategy, implemented data-driven marketing, and are helping your clients focus on the metrics that truly matter to their businesses. How do you go the extra mile to keep your clients in it for the long haul?

By adding call tracking to your agency's tech stack, you can unearth surprising insights that make a world of difference for your clients' businesses and, by extension, your churn rate. But don't just take our word for it—our agency clients' success stories speak for themselves.

1

Paracore nearly eliminates churn by adding call tracking

Our friends at Paracore out in Tempe, Arizona, have scored some big wins for clients thanks to the data they collect through call tracking in CallRail. “What we offer our clients goes beyond just collecting data,” Paracore founder Adam Arkfeld says.

“Since we have a lot of calls coming in that we need to process and review, we have a very strict tagging system for categorizing calls, for new leads, repeat callers, missed calls, and so on,” he says. “Thanks to how we’ve organized our tags, we can often get insights about a call just on the tags alone, before we even listen to the recording or dig into the metrics.”

As a result, they're able to easily synthesize their data into reports based on the internal tags they've created in CallRail. Not only is this a big timesaver in terms of hours spent poring over spreadsheets, it's also easier to explain exactly how this data fits into the client's overall business objectives—even if those objectives are outside the bounds of the specific campaign Paracore is working on.

The successfulness of Paracore's approach speaks for itself: In the last year they've been using call tracking, they've only lost a single client. (And that client was only 'lost' because their business was acquired by a bigger firm with a pre-existing agency relationship.)

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“Now we have transparent measurables that go beyond simple vanity metrics. The sugar-spike- high marketing data that every business gets but might not understand— CallRail brings that to life. There’s no theory with CallRail. It is all real data you can sink your teeth into, and there’s always plenty of meat on the bone.”

—Jon Gosselin, CEO at Earn More Do Less

2

Cardinal uses call tracking to add value outside of their service offerings

Atlanta-based agency Cardinal found value in CallRail beyond just analytics. They've made extensive use of [the Call Recording feature](#) in particular—this allows them to record and save every inbound or outbound call for later review. They now take the time to review call recordings for all of their clients, in order to gauge how the client's phone team is performing, and any areas of improvement that may need to be addressed.

By taking on the role 'calling coach,' Cardinal identified a frequent blind spot in the client's sales funnel—the over-the-phone sales and customer service experience. Call recordings help Cardinal highlight for clients the importance of proper call quality assurance, which in turn spurs meaningful changes to phone team training.

Though this fell outside of Cardinal's usual purview of SEO, web design, and paid display ads, they quickly saw how Call Recording could help them provide even more value to their clients (and charge more for their services, accordingly). Now, Cardinal is earning more for their services and retaining clients for longer, and their clients are seeing better results from their campaigns—a true win-win for everyone involved.

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3

Call tracking helps SalesX cut client's CPL by 90%

The folks at SalesX, a Bay-area agency, are some of the best of the best when it comes to digital marketing. As an early evangelist of Google Ads (they even hired one of its creators to sit on their board), they've developed an impressive track record when it comes to using digital marketing to boost a client's business.

However, SalesX found that some of their clients were a little old-school, and don't rely exclusively on digital channels to drive revenue—calls are a mission-critical channel for many of their clients.

And in the case of one client, the top-to-bottom use of call tracking helped deliver some seriously eye-popping results: A Cost Per Lead reduction of more than 90 percent, coupled with a 35 percent boost to their conversion rate!

With results like that, SalesX's clients can be confident that they're earning amazing ROI—both on the money they're spending on ads, and what they're spending to be a SalesX client.

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“For us, [call tracking] was a critical part of our mission, because we want to be able to accurately track all sources of contact for our clients. And we found that for most of our clients, they were tracking form fills and web sessions and everything else, but not calls.”

– Joe Khoei, Founder and CEO of SalesX

4

NYC SEM proves 800% ROI for client, thanks to call tracking

This New York City-based digital marketing agency knew they were delivering seriously impressive ROI for their clients, but they had difficulty proving that new business was directly tied to the campaigns they were running.

By implementing CallRail for one of their clients, they were almost immediately able to prove that their relatively modest ad spend of around US \$1,000 was bringing in tens of thousands of dollars in revenue for their client—anywhere between 500 to 800 percent ROI on their ad spend in a given month.

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“I could immediately see that all the sales for these products were happening over the phone and I would never have been able to measure this through web conversions.”

– Darren Carter, NYC SEM Marketing Director

5

Wonderist boosts client's monthly revenue by over 500%

Dentistry—like other medical businesses—is a specialized field where calls are still crucial. Prospective patients rightfully want to speak to a real human before they commit to putting their health and welfare in your hands, so phone calls are a primary channel when it comes to earning new leads and drumming up business.

Most dental offices take a piecemeal approach to marketing, hiring one firm for digital ad buys, another for web design, another for direct mailers, and so on. Wonderist, a San Diego-based dental marketing agency, understood that they could deliver both real value and cost savings to clients by centralizing all of these operations under a single roof, with call tracking as one of the central pillars of their marketing efforts.

“We can bring that call tracking data to our client and demonstrate the direct role our advertising had in their success.”

– Michael Anderson, Co-founder of Wonderist

And their results speak for themselves: By putting CallRail to work for one Pittsburgh-based client, they saw a 530 percent increase in monthly appointments year-over-year, along with a comparable increase in revenue.

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“Most importantly for us as an agency, the data from CallRail meant we didn’t have to sit on our hands and say, ‘Gee, I sure hope we were part of helping him drive all those new patients.’”

– Michael Anderson, Co-founder of Wonderist

6

FreeGren proves client ROI and increases leads and conversions by 40%

Client retention is one of the thorniest problems any digital marketing agency will face. At the Bellevue, Washington-based marketing agency FreeGren, they knew they needed a different approach to differentiate their business from the crowd.

And so, they adopted a forward-thinking strategy: Instead of focusing exclusively on big payouts from enterprise-grade clients, they would instead prioritize relationships with small-to-medium sized clients, especially those in markets with a high average transaction value.

In one memorable case, they knew that they were delivering great results for the client, but an absence of comprehensive analytics meant that the client wasn't totally sold on the value of FreeGren's services. But after a top-to-bottom implementation of CallRail into the client's marketing stack, FreeGren was able to conclusively show how their campaigns for the client had directly resulted in a 40 percent increase in leads and conversions. (All in the space of only three months!)

By delivering such excellent results, and providing total data transparency along the way, FreeGren is also helping their bottom line in a big way—they almost never lose a client to churn.

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7

IVIO doubles client's new customers on the same budget

You read that correctly: By implementing call tracking for a customer who previously had not been tracking any calls, this Phoenix-based legal marketing agency helped a client more than double their monthly business.

By using CallRail's Keyword Tracking feature, IVIO was able to zero in on the Google Ads keywords that were driving the most calls and new business to a client. That, in turn, helped them focus their ad spend on the best messaging and most lucrative targeted audiences.

As a result, one of IVIO's clients saw their number of monthly appointments more than double (going from 12 to 25), along with a corresponding increase in monthly revenue—all without having to spend a single extra penny on ad buys.

While there may not be a magic bullet, one-size-fits-all solution for proving and improving client ROI, these examples illustrate how [strategically using the right call tracking features](#) can make a serious difference for your agency, and for your clients.

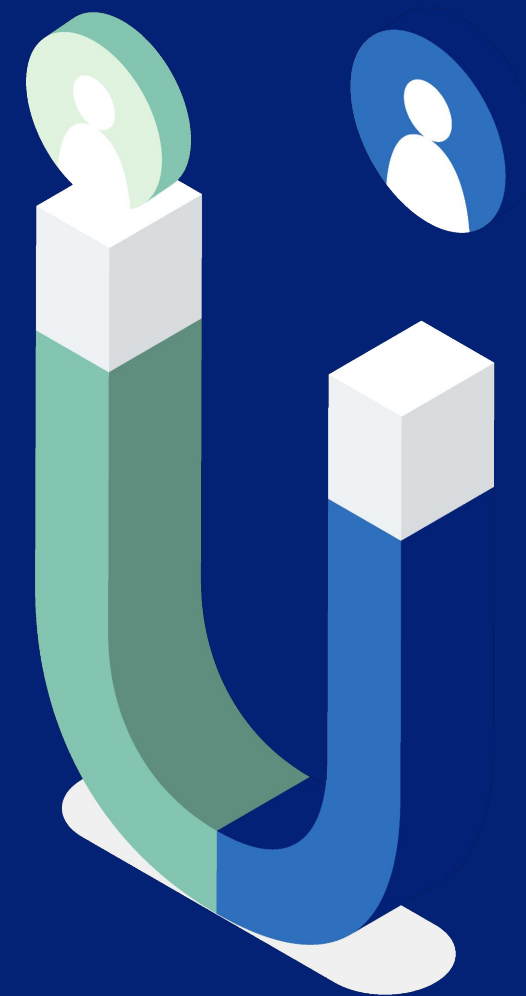
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Conclusion

Client retention can make or break your agency. In order to stay competitive in today's crowded agency marketplace, it's critical that you do whatever possible to minimize client churn.

Achieving this is a multi step process. First, you have to figure why your clients churn in the first place by talking to your clients and digging into your marketing data. Then, you reevaluate your own marketing tactics to make sure you're attracting the right clients in an effective way. And finally, fine-tune your data strategy and marketing tech stack to consistently provide your clients with customer service and results they simply can't get anywhere else.

With the right combination of planning, data, technology, and thoughtfulness, you can keep your clients in it for the long haul and grow your agency.



Start your free trial

We would love to set up a free trial for you to show how simple and powerful CallRail is.

[Try CallRail free for 14-days](#)