JOURNEYS
Through Search

Is Your CRM
Fully Setup for Your Call Center?

Get Our Top 7 CRM Configurations Here for Free.

Mobile Is Best In Horizontal Mode

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If you need help setting up any of these integrations,
reach out to myself, the author of this eBook:
johnny@journeysthroughsearch.com

What to Expect from this eBook

The Goal of This eBook:

If you have a CRM setup and have agents answering your inbound leads – then this will be a game changer for you.

Our goal is to show you how to really take control of your CRM and Marketing by understanding the following:

- The Importance Of Integrating Your Systems
- The Right KPIs To Measure For Maximum Impact
- How To Set Up Automations That Will Save You Time And Money

This eBook looks to use these insights to help you transform your business and stay ahead of the competition!

Why Can You Trust the Ideas Provided in this eBook?

We have spent over $150,000,000 in Google and Bing Ads over the past 9 years

We have set up lead management & CRM systems that have managed millions of inbound leads,with many clients **handling over 1,000 new inbound calls per day, every day**

We have set up payment and client management systems that **have processed $100 of millions of dollars**

The information provided in this eBook might be a bit technical, but they ARE vital.

I want you to either (a) do the things mentioned in this book on your own, or (b) hire professionals to help you do it. If you need the professional help, our team of experts could provide the help you need, but you could also leverage existing relationships with other companies too.

But as Nike says,
whatever decision you make,
"Just Do It".

Key Questions to Ask After Reading this eBook (treat it as your homework):

Before we delve into the subject matter of this book, below are key questions to answer before you begin reading. Don't worry if you can't answer any or all of these questions.
That's part of what this book will help with.

After completing this book, you should be able to answer most of the questions below, plus many more, to build and improve your KPIs. If you see a question below that you can't answer, let us know. Happy to get you going in the right direction for free if you are going to do it yourself.
If you want to hire us, email me too.

Either way, I'm happy to get you going in the right direction.

Check them off once completed

- [ ] Are you able to calculate the cost per Lead, cost per Qualified Lead, and cost per Sale across every (1) campaign, (2) keyword, (3) ad group, (4) landing page, (5) audience, (6) referral website, (7) device, and (8) ad type? So this information is stored in your CRM, and then you use the costs from your marketing platforms to calculate the cost per Qualified Lead + Sale of each of the above metrics.
- [ ] Are you tracking Brand vs. Non Brand in your ROI analysis for Search campaigns (Paid and Organic)?
- [ ] Do you know if your Outbound Caller ID is showing your company name? Or if it says, "Scam Likely"?
- [ ] What automation are you using with Tasks, Emails, SMS, and integrations between systems? What automations would you like to set up? Which automations are the most important?
- [ ] If you audit 15 random leads that are in an Open status in your CRM, will 100% of them be followed up on in a way that you would want them?
- [ ] Is your percentage (%) of total Missed Calls under 10%, and then for all calls "post call queue", is the number of calls missed under 5%?
- [ ] Do you know the day of week and hour of days when Missed Calls are the worst?

Much of this is technical stuff, but some you can do on your own. (and again, what you can't do, you can hire us or someone else to complete it).

The great thing is, once it is all set up, it is a living, breathing ecosystem, where you can touch levers throughout to make game-winning changes to your company's bottom-line.

TOP 7 CONFIGURATIONS

Start Now

Configuration No. 1:
Rediscovering Long Lost Sales Opportunities

There are often lost sales opportunities in every business; leads that dropped off the sales funnel before making a purchase. **These lost sales may occur due to:**

A. Not Following Up On Missed Calls Quickly The First Time,
B. Not Calling Consistently Until They Answer,
C. Poor Follow-up Before A Sale Is Made,
D. No Email Or SMS Automation,
E. No Task Automation.

Here, you will learn how to rediscover these long-lost sales opportunities by fixing the lead management in your CRM, and potentially re-engage these leads.

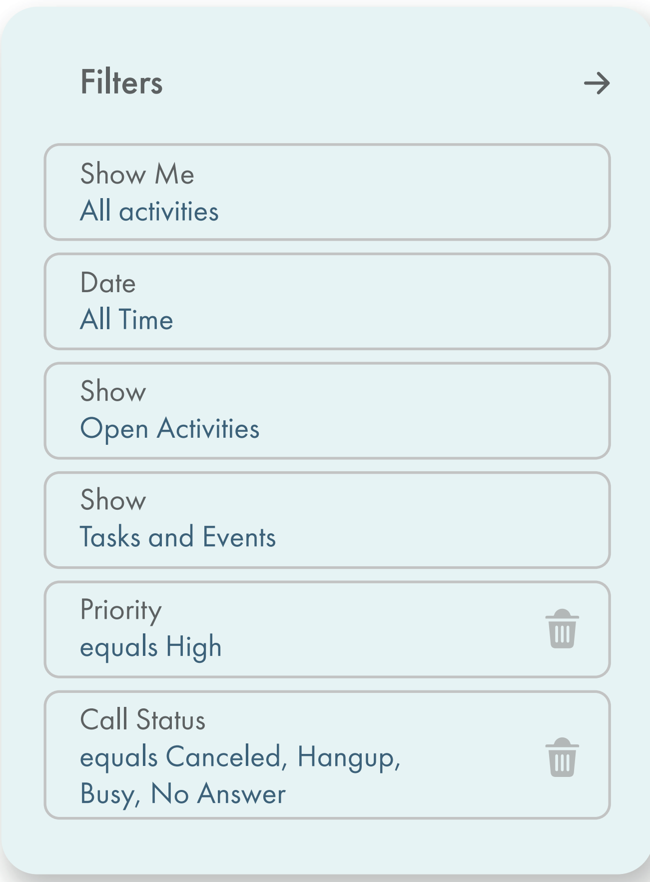
A) Rediscovering lost sales caused by not following up on missed calls quickly the first time

You should have a report / dashboard that shows all your Missed Calls. That dashboard should always have 0 missed calls on it, unless you are actively working on them. **Here is what I mean.** You should integrate your phone system and CRM to show all phone activity (inbound and outbound calls). There should be a report that shows 100% of missed calls. Any Missed Call should be created as a Task/Activity, and left Open in High Priority.

Then set up an automation to manage the reporting on your Missed Calls.

Automation of the Set-up for Updating Missed Calls You've Called Back:
If any inbound or outbound call is answered on that phone number with a missed call – after the missed call, then the system should automatically mark the Task/Activity as Completed / Normal Priority.

The report you set up earlier should have a filter to show the following.



So, this shows all "Open / High Priority" Missed Calls.
If you set up the automation to mark the Activity/Task as Closed and Normal Priority, it will then remove it from your report of Missed Calls.

This way, you can truly know whether your team are calling back all Missed Calls or not.

And trust me, people will say "oh they are spam" or "they didn't leave a voicemail, so they aren't serious". But the reality is that if you calculate the Lead to Qualified Lead rate on Inbound Leads – where the first call is answered or missed, you will see a similar performance (if you are actually calling back missed calls in a timely manner).

If you aren't calling back Missed Calls in a timely manner, then calculate the Lead to Qualified k?" Lead rate on Inbound Calls – where the first call is answered vs missed.

Get that percentage, and then see if you start calling back Missed Calls faster, if you can improve the Lead to Qualified Lead rate on Missed Calls.

B) Rediscovering lost sales caused by not calling back missed calls consistently until they answer

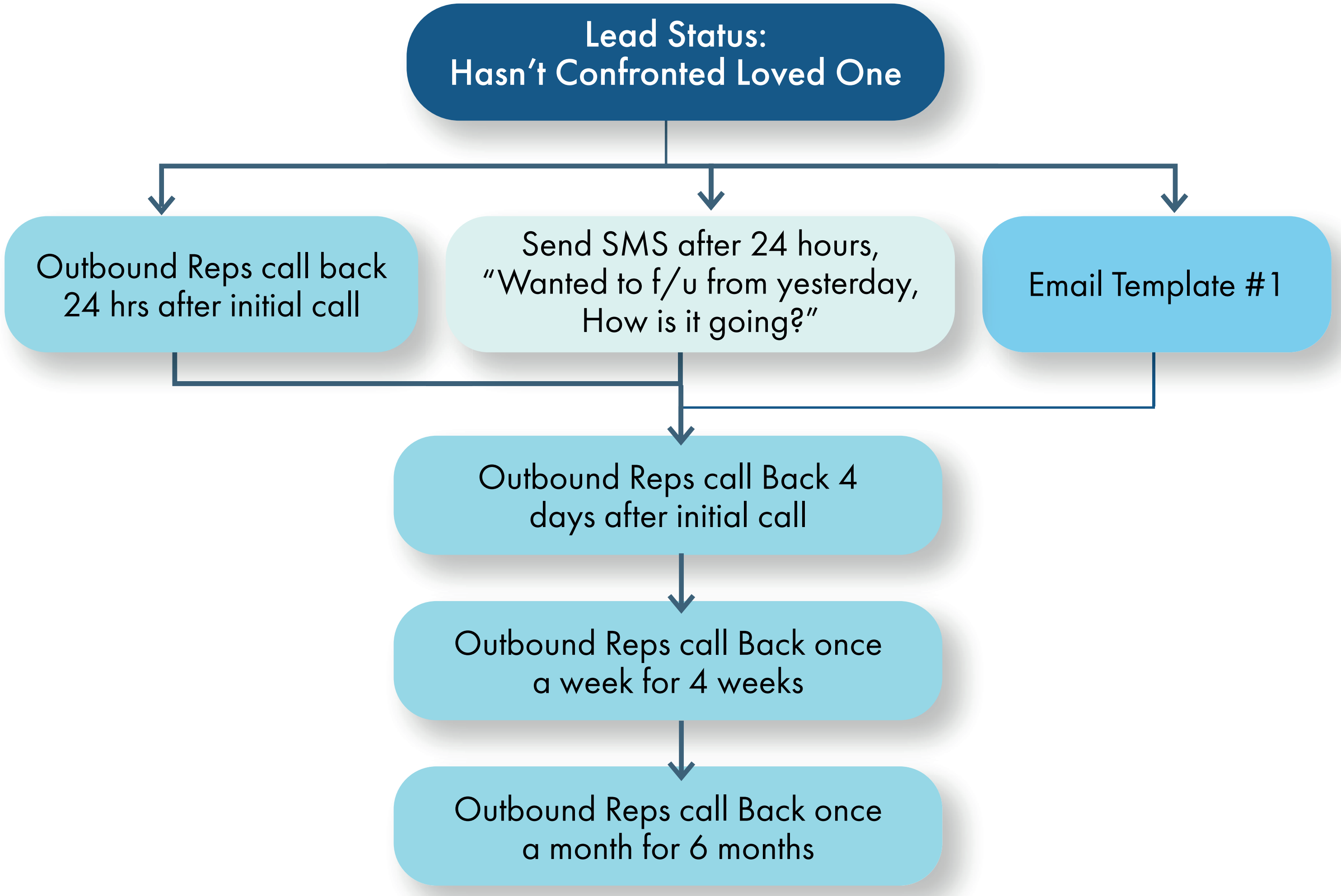
The second point from above is that OK, you called back a Missed Call.

What if they didn't answer right then on the first call back?
How often are you calling them back?
And who is responsible for calling that lead back?

With Missed Calls, the Lead Owner is usually the Manager or a System User. Which is why you need to make an automation, the first person to make an outbound call, add a note, or edit a field, the Lead Owner should automatically set in their name as the Owner. Then your Call Center Manager should have a report that shows all Missed Calls, and that way when agents have days / shifts off, the New/Open leads can be passed between team members to call back and either (a) close out, or (b) qualify and move forward.

C) Rediscovering lost sales caused by poor follow-up
Similar to having a process for follow-ups on Missed Calls, you should also have follow-ups for any qualified lead that has not yet converted. You can have automated follow-ups.

You should have a full follow-up process for all Lead + Deal/Opportunity Stages.
For example, below is an example for a Lead follow up for a drug and alcohol treatment center where the caller has not confronted their loved one who has a problem.



You can make an SMS and email template for each status, and treat it like a drip campaign. Which leads us to the next area to find lost money:

D) Rediscovering lost sales caused by the absence of email or SMS automation

Here is a point elaborating on the above point in (C) above... You should have automated SMS and Email campaigns. Keep in mind, you need to do SMS marketing in compliance with the law. If you are uncertain of how to manage SMS compliantly, especially if you need to follow HIPAA guidelines (if you work in healthcare, you are legally required to protect patient or potential patient data, this is what HIPAA breaks down – how to protect anyone's medical information), then discuss with a professional. We also help with compliant SMS set up on your website, in your call center, and training your reps. If not with us, then you need to do it yourselves.

If You Email Us, I'm Happy To Send You
Our Guidelines For Free

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Now that we have discussed compliance, allow me to explain the drip campaigns we would set up.
For example, let's say you used ActiveCampaign or Mailchimp, you could have lists that have email drip campaigns associated with them. **So while a lead is in Lead Status = New,** you can have 2–3 emails go out over the course of the buying cycle of your typical client (if they buy quickly, send daily, if the consumer buying process can take weeks or months, then send the emails once per week).

The idea is to send them common reasons to buy from you, things they should consider in general when buying. If you focus on educating the client while in **Lead Status = New,** you stand to be seen as a thought-leader/trusted source in your field.

Now let's say you have contacted a lead and qualified them, now they are in **Lead Status = Qualified.** They shouldn't receive any more emails from the **Lead Status = New drip campaign.**

Now that we know they are qualified, we can start sending emails about alternative options, payment plans, financing options, testimonials, and other steps that may be going through their mind at the last minutes of the buying process. If someone stays in a qualified status for too long, you can send them a Discount Code. For example, if the typical buyer closes within 30 days, you can send out a discount code around day 25-35 to get the last minute decision makers.

Once a person becomes a Client, all the previous email drip campaigns can be turned off, and then the last drip campaign can start.

Once they have received services or your product, you can then ask for reviews, referrals, feedback on your services/product. In some businesses, people also make follow-up purchases, for example, in Insurance, they may need to renew each year, and so you should be sending emails before their renewal, to make sure the client is still happy and to address any concerns before renewal, and before they start seeking alternatives. You may even want to send a discount for any future purchase, or free access to tools/resources that your company can organize for existing customers. Even just a "Thank You" email goes a long way in the post-purchase process. And all that can be automated.

You never know how many referrals and repeat business an automated email can build for you.

Same process above can be done with SMS. SMS automation works especially well with follow-ups on New or Qualified Leads that haven't picked up a call or replied to an email.

Even if it is to just say they aren't interested, and allow you to close out the lead and focus on the ones that matter (vs calling someone 5+ times before you get the same message).

Sometimes they'll respond with a good time to call. No matter what, automated SMS and Email should be a part of your call center follow-up strategy.

CASE STUDY 1

We had one client where the reps were allowed to just not update all leads in the CRM. From the task automation and call center dashboard build-out, we went from around 30% of leads not being fully updated nor followed up consistently to less than 3% of leads not being followed up on consistently.

If you replicate these results...

- **What is it worth to you?**
- **How much is each lead or deal worth to you?**

D) Rediscovering lost sales caused by no task automation

Your agents should be able to log into work, and see all their tasks for the day.
According to the example above, with the Lead Status = Hasn't Confronted Loved One, you can see the automated tasks created by the system are 24 hours later, then 4 days later, and then once a week for the first month and once a month until the Lead Status is closed out.

We don't create all the tasks at once though, or else all the agents would have hundreds or thousands of tasks, and won't know where to focus. So, we create one task at a time, and then once the agent does an outbound call, or an inbound call is received, then we mark that task as completed, and create the next one with a new due date.

This way, the agent sees all the calls they need to complete for that day. Well, their dashboard would have "Overdue Tasks", "Tasks Due Today", "Upcoming Tasks" - this way they can manage their day. They will also see all inbound SMS and emails that they would handle as well.

Can all follow-up tasks be automated?

Not all can be automated. Let's say, for example, the automated tasks says to call back every week, and the potential client says to call back in 2 weeks for a valid reason.
Let the agent do that. All the agent will have to do is adjust the due date of the newly created task. And if they complete the task at that time, then after that the predetermined future tasks will still get generated until the Lead Status is changed to either Closed Lost or Converted to a paying client.

Configuration No. 2: Strategies for Managing Poor Performing Reps

Your CRM can also be used to track agent performance and identify and manage underperforming reps. To achieve this, you will want automated reporting to show how your reps are performing. Do you have existing metrics to measure on your agents/reps who answer inbound leads? For example, here are some Call Center KPIs (key performance indicators) that we use:

- Lead to Qualified Lead Rate.
- Lead to Sales Rate.
- Total Number of Inbound vs. Outbound Calls + Average Talk Times.
- Average Length of Time per Qualified and Non-Qualified Call.
- List of Non-Qualified Reasons and anomalies as compared to their peers.
- The following two KPIs are important for email & SMS automation:
  - Number of Inbound Call Leads w/ Email Capture
  - Number of Inbound Calls who Agree to SMS
- Call: Note ratio (this should be 100%, as every call should have a note added to the Lead).
- Cancellation Rate on Clients.
- Incomplete Tasks (total + as a percentage of their total tasks).

CASE STUDY 2

Any good call center manager will know which reps are poor performers and which are the high performers. However, after building out a dashboard for a client, we were able to create a Points Dashboard, along with the above metrics. This allowed the call center manager to have specific statistics and goals to offer the agents. They were able to justify training and the need for new hires as their call center went from 50 inbound calls a day to over 500 inbound calls a day.

- **Would it help your call center to automate all agent KPIs?**
- **Could you find areas to train and improve?**

Example of Total Number of Inbound vs Outbound Calls + Average Talk Times:

Name

Name	Inbound Calls	Avg Time Inbound (min)	Outbound Calls	Avg TimeOutbound (min)
1. Lorem ipsum	1,242	2.5	610	2.71
2. Jorem ipsum	1,084	2.99	1,198	2
3. Lorem Mpsum	954	3.34	802	1.38
4. Porem Ppsum	855	2.82	1,288	1.93
5. Horem Hpsum	690	3.78	749	2.28
6. Rorem Opsum	668	2.36	283	1.51
7. Torem Ipsum	582	**5.12**	537	3.7
8. Lorem Ipsum	474	2.82	371	3.19
9. Dorem Dpsum	441	3.85	663	1.9
10. Lorem Ipsum	381	2.58	271	1.99
11. Corem Kpsum	213	2.99	122	2.05
12. Worem Ipsum	41	0.11	340	**15.03**

Having such automated reporting enabled on your CRM will help you identify when sales reps are underperforming in your business and track who these underperformers are.

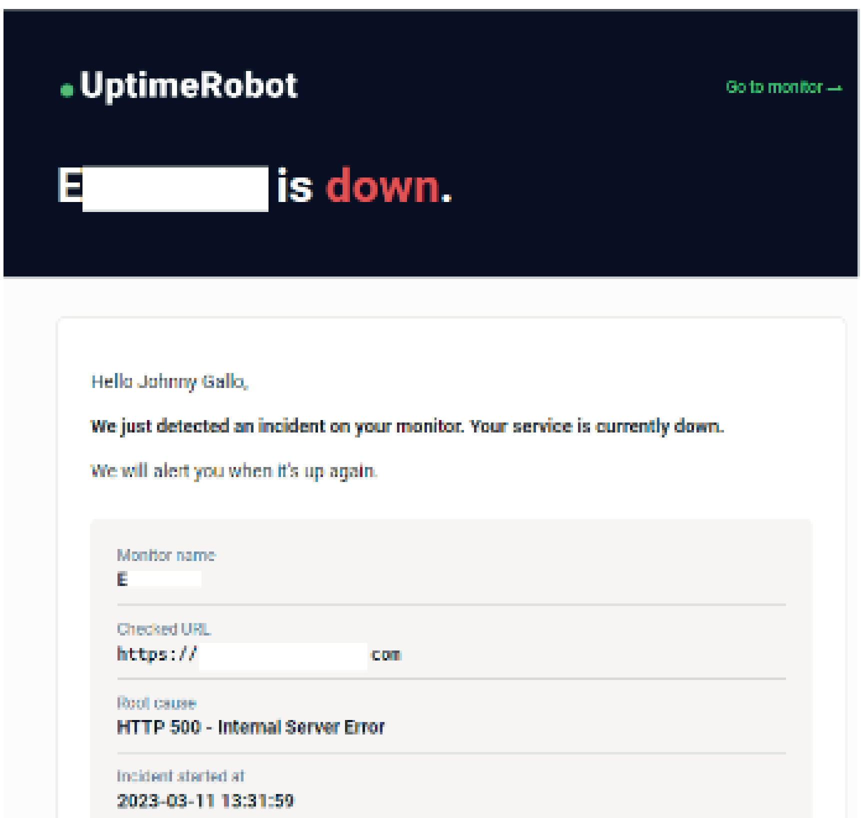
From here, you can create strategies on how to best manage the situation.
Usually, it consists of training and goals/benchmarks within a set time-frame. And if the agents don't achieve their goals in the set time frame, then you can look at further training if you see some improvements, or replacing them with a new agent for training if you don't see improvements after various training periods.

Configuration No. 3:
How to Leverage Reporting and Alerts

Successful businesses need to be able to make decisions quickly and with confidence. This is only done from proper reporting. For example, you'll want to know immediately when things break, or summaries of integrations or daily reports. Your CRM can also help you out here.

To optimize this effects, alerts and reports need to be categorized in the following:

- **Daily -** a link to daily reports on production of marketing campaigns.
- **Hourly -** you may want to set up an hourly checker on a server that reports conversions back to Google Ads. And so if it fails, you get an alert maximum one hour later. Then you can fix the integration quickly on the same day.
- **Instantaneous -** For example, if your website(s) crashes, or tracking fails, do you get an instance email? Or when you have a recurring payment fail, who gets the email, will the system retry according to the error type, and who is responsible for fixing it? These types of things need to be fixed and answered the same day, not when you randomly find out at some random time. **Website downtime monitors -** checks a website every 5 minutes on this free monitor with https://uptimerobot.com/ | You can pay $7/month, and it will check every 60 seconds. **This way you know immediately when your website crashes.**



Hi team,

Please check yesterday's leads.

Live Chat (Chatra) Leads
Total: **17**
Missing Tracking URL: **1**

Web Form (Gravity Forms) Leads
Total: **6**
Missing Tracking URL: **2**

Phone Call (CallRail) Leads
Total: **143**
Missing Tracking URL: **1**

Thanks

One attachment • Scanned by Gmail

Missing Tracking ...

This is an email we receive daily about the leads and if there are any with missing tracking on them for lead source/marketing attribution.

If anything has a missing lead source, we then attach it to the email to further verify and investigate.

CASE STUDY 3

Whenever a website goes down, or tracking fails, we get alerts. We know immediately if a website crashes, and the same day about any tracking issues. This way there is always consistent reporting and quick reactions to emergencies. We've had websites crash, and then within 10 minutes, we have logged into the server and rebooted the instance to do an easy fix (AWS servers in this example) or restored a backup if the fix is a bit harder. Your reaction time to fixing a problem is dictated by how fast you understand the problem.

- **How fast does it take you to react to a down website?**
- **How fast does it take your team to react to most issues?**
- **Think about the top alerts you should set up and how that can help your business**

Configuration No. 4: **Tackling Lack of Branding on your Outbound caller IDs and/or Being Marked as "Spam Likely"**

Are you labeled as "Spam Likely" on Outbound calls?

- **Have you tested it?**
- **You should know what people see** on their phone when you call them.
- **OK, so if you don't know** whether it shows as Spam or not.
- **Do you know if it says your company name as the Caller ID?**

When you purchase numbers (local only), you have to then set up your Caller ID.

Here is how to set your Caller ID on a Local Number
You can only set a Caller ID on a local number, and then use this as your Outbound Caller ID.

It should improve your chances of getting people to pick up your calls. Especially if they submitted a web form first.

You simply have to email your phone provider to update the Caller ID on your phone numbers.
There is a character limit of 15-characters.

On T-Mobile phones, they can sometimes mark your calls as "Scam Likely". This is something you certainly need to test on all of your Outbound phone numbers.
And if it is a problem, see below how to fix it.

Remove Scam Likely/Spam Risk if You're Affected

First test it out. The only real way to test it out, is to call a number registered with Vonage, another number registered with T-Mobile, and a 3rd number registered with AT&T.

This covers 95% of phone numbers in the US. Some Vonage users have to opt in to the spam likely feature. But you can figure it out yourself by just asking people what showed up.

If you have numbers marked as spam, you can do 1 of 2 things.

- Replace the number if marked as spam.
- Use a new number for your outbound calls.
- Submit your number to the top 3 carriers (T-Mobile, AT&T, & Verizon) that YOU ARE NOT A SPAMMER.

See next. And don't shout at support of any company - please.

Let's get that Spam Likely removed.
Here are another set of easy instructions to get your number registered and removed from being marked as spam. But honestly, sometimes it is easiest to just quickly create a new outbound number while you fix any numbers marked as spam. So don't hesitate here.

DIY Instructions on Fixing Caller ID and Remove as Spam (no tech experience needed)

- **Register** your number with your carrier as a business and the owner of that number. They should have some type of process for this. Call Tracking Metrics has a "Trust Center", and this is similar in all organizations that host phone numbers. And so make sure to register your numbers. As they can sell you a number without registering it (and it will still work, which is why it is important to ask them to register it with your company name). Once you have registered your phone number(s), you can test each one via **https://calleridtest.com/**

- **Request** to be removed from spam:
  Visit the links below, and whether you are registered as spam or not, you should register.
  This is preventive maintenance. Like putting oil in a machine.

T-Mobile FirstOrion / PrivacyStar

Pick Single Business management

Verizon

Verizon / Wireless / TNS

AT&T

If you are only doing this process for a couple of phone numbers, go ahead and get started. But if you have more than 10, get all of them in a CSV file (Microsoft Excel or Google Sheets) and submit them. It will take a couple of days for them to get approved, and then you'll be all set.

CASE STUDY 4

We have one client where each agent has their own Outbound Caller ID, then a main one. The issue they had was that it was showing as "Spam Likely" on their outbound caller ID, and causing people to not pick up the phone at a high rate on outbound calls. So we added in their branding to the outbound caller ID, and the answer rate on **Outbound Calls went from 10% to 45%.**

- **Do you know what your Outbound Caller ID is saying?**
- **Test it out on a T-Mobile device, Vonage device, and AT&T device.**
- **Record what it says on each one.**
- **Then update if needed.**

Configuration No. 5: Tracking Marketing Campaigns on Inbound Leads

You will want to track all lead types on your website (for example: Forms, Chats, SMS, and Calls).
To do this, you need to know the First Click and Last Click Attribution on all your lead types on your website. And then you'll also have to track all external ad platforms (for example - call extensions in Google Ads/Bing Ads or TikTok & Facebook Lead Forms).

You can track all the UTM and custom parameters you want in your URLs, and send them to your CRM for reporting.

Once you are storing the tracking URLs in your CRM, you can do the following:

- Automated Lead Source Attribution.
- Offline Conversions in Google Ads / Bing Ads / Facebook Ads.

Offline Conversions

So, you can also do Offline Conversion Reporting. For example, by capturing the GCLID/GBRAID/WBRAID in the URL for all Google Ads leads, you can then store than in your CRM, and when people are qualified or convert, you can upload those offline goals back to Google Ads. This is all automated as well, because you want to avoid doing the same thing every day, manually uploading offline conversion files.

Automated Lead Source Attribution

Here is a sample Google Sheet where we show you the automation in your CRM where you look at the Landing Page URL and Referring Domain and then update the lead source accordingly.

Click Here For a Sample Lead Source Automation

The above Google Sheet is an example of some common online digital campaigns that you would typically track.

How to Set it Up

Keep in mind, you will need to set up tracking on your lead types (web forms, calls, chats) where you pull in the Landing Page URL and Referring Domain to your CRM.

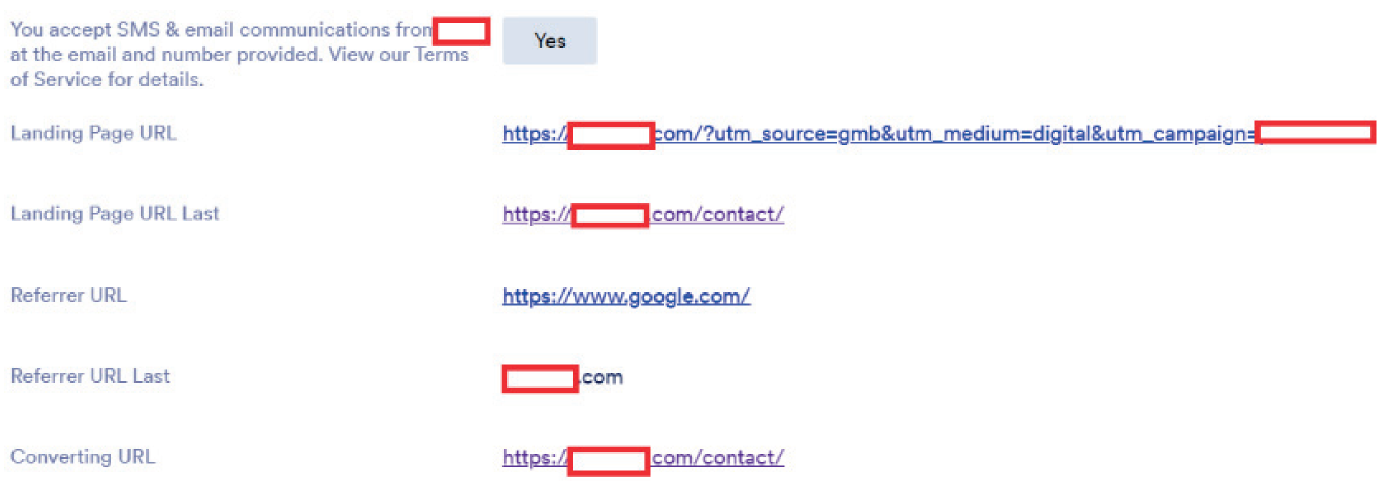
We create a custom browser-based cookie that stores this information and every time we create a new lead in the CRM, we store this information. **If you struggle with this part, email me and I'm happy to give you some guidance on this.**

You can see below from a form fill the hidden fields that are showing that this person first visited the website via Google My Business (source=gmb). And then they came back to the website directly and ended up converting on that second direct visit.

But the first click attribution would be Google My Business, and so that would be the Lead Source we would automatically update in the CRM.

You would add the hidden fields on all your lead types (forms / chats / calls).

For calls, you can use a tool like CallTrackingMetrics.com, and for chats and forms, you would need to set up a custom cookie.



You accept SMS & email communications from [redacted] at the email and number provided. View our Terms of Service for details.	Yes
Landing Page URL	https:/[redacted]com/?utm_source=gmb&utm_medium=digital&utm_campaign=[redacted]
Landing Page URL Last	https://[redacted].com/contact/
Referrer URL	https://www.google.com/
Referrer URL Last	[redacted].com
Converting URL	https:/[redacted]com/contact/

Here is a resource where you can learn about creating cookies for your systems:

Create Your Own Cookies

Example report you can make
once tracking is fully set up:

Then do a Conversion Rate and Cost per Qualified Lead/Sale on Hour of Day and Day of Week.

Here is a sample analysis where we look at the Cost per Hour of Day and Day of Week. Then we look at the Number of Qualified Leads generated in each of those hour blocks. And then we calculate the Cost per Qualified Lead across every hour of every day. Then we take that data and optimize various advertising campaigns. This way we can optimize ad spend. You can see below that Monday and Tuesday are good for a cost per qualified lead.

Cost								
Hour of Day	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Grand Total
9	929.21	811.7	1340.66	857.83	778.74	1347.54	1041.78	7107.46
10	1093.87	1361.15	1370.13	1561.78	1405.8	1474.05	645.76	8912.54
11	588.86	1502.73	1375.49	1112.03	1369.07	789.67	512.31	7250.16
12	963.56	782.02	1434.47	1395.78	1271.31	1416.71	1279.9	8543.75
13	969.83	1715.91	1370.53	1011.21	2213	1252.5	1489.54	10022.52
14	650.8	1569.04	1589.96	1326.98	1436.26	1278.38	1485.74	9337.16
15	1265.36	916.92	1623.07	1255.07	1003.69	1299.56	1216	8579.67
16	1639.81	1790.23	1753.4	1098.68	598.54	1540.59	2363.07	10784.32
17	1501.87	1644.27	1089.7	927.42	1057.87	1238.56	1296.98	8756.67
18	1066.37	887.65	1209.29	1033.12	691.76	1614.14	1250.75	7753.08
19	1455.01	1016.49	738.32	1256.62	777.92	786.93	508.07	6539.36
20	1351.17	796.68	730.05	765.15	738.81	934.69	581.82	5898.37
21	658.79	497.94	719.59	1637.95	456.55	341.24	923.21	5235.27
22	973.51	898.91	705.98	633.09	597.26	220.86	731.53	4761.14
23	0	0	0	0	0	0	0	0
Grand Total	15108.02	16191.64	17050.64	15872.71	14396.58	15535.42	15326.46	109481.47

# of Qu. Leads								
Hour of Day	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Grand Total
9	2	1	5	1			2	11
10		1						1
11		1				1		2
12		1	2		1	1	1	6
13		2	2		3			7
14	2	1	1	1			1	6
15		3	3					6
16		1	2	1	1	1	1	7
17	1			1		1		3
18			1			2		3
19		1	1	1	1	1		5
20		2		2				4
21			3		2			5
22	1	1	1	2	1			6
Grand Total	6	16	21	9	9	7	5	73

Cost per Qu. Lead								
Hour of Da	Sun.	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Grand Total
9	1305.97	1225.193	817.256	3531.64	#¡DIV/0!	3611.26	1099.925	1662.154
10	#¡DIV/0!	1215.3	2090.045	#¡DIV/0!	4046.18	1840.215	2437.97	2745.161
11	#¡DIV/0!	1000.165	1045.123	#¡DIV/0!	1213.345	1729.44	3281.75	1721.095
12	1292.095	1016.743	878.992	3733.97	1230.143	3947.59	2127.59	1468.602
13	1442.995	700.3117	763.9267	3593.26	1550.983	#¡DIV/0!	4191.28	1470.492
14	1777.985	855.238	827.7383	1840.365	3038.49	4118.53	2532.405	1510.587
15	4407.04	1087.855	893.234	1640.585	2660.1	2039.355	4876.05	1757.541
16	4208.05	4322.15	1350.797	1529.61	2348.17	1098.323	4910.8	2099.544
17	4023.25	3548.41	1518.655	1608.58	2527.55	909.9075	#¡DIV/0!	2095.374
18	#¡DIV/0!	900.2733	1338.83	1018.297	2208.49	1111.92	#¡DIV/0!	1682.568
19	#¡DIV/0!	770.37	546.99	1219.907	657.76	2062.86	#¡DIV/0!	1262.357
20	2983.47	731.1767	538.905	759.0475	597.54	#¡DIV/0!	#¡DIV/0!	1059.652
21	1632.3	1396.85	356.3925	1135.52	351.27	#¡DIV/0!	#¡DIV/0!	908.7645
22	1632.3	1396.85	356.3925	1135.52	351.27	#¡DIV/0!	#¡DIV/0!	908.7645
23	2983.47	731.1767	538.905	759.0475	597.54	#¡DIV/0!	#¡DIV/0!	1059.652
Grand Total								

If you don't get leads every hour of the day, you can break it out into 3 / 6 hour spreads, and then just calculate the cost per lead per every 3 or 6-hour block. Or you could do it per shift if you run multiple shifts in your call center. Another great way to track it to find out profitability per shift (which is especially crucial for overnight shifts and knowing when you should open up an overnight shift, shutdown your current one, or outsource it to an overnight call center answering service).

CASE STUDY 5

From the above screenshot showing the Cost per Qualified Lead per Hour of Day / Day of Week from Google Ads, you can see the results of 1 month of spend.

We used that spend to find out the days of the week and hours of the day we had the best ROI. We changed the day schedule in Google Ads and started to spend more of the budget on Monday and Tuesday, and we were able to capture more of the lower costing Qualified Leads.

This dropped the cost per Qualified Lead by 30% from changing the days of the way and hours of the days where we allocated budget in Google Ads and Bing Ads.

Do you know if your day schedule is fully optimized?
How much wasted spend or better spent money could result in how many more deals for you?

If you can get more Qualified Leads at a better price, from doing the analysis above,
How much do you think you'll save in marketing spend?
How much extra Qualified Leads do you need to get a Sale?

Now you can calculate how much potential revenue is sitting on the table still.

Configuration No.6:
Improve Your Follow-Ups with Post Call Queue Missed Call Reporting & Follow-Ups

See the 24-hour by 7 days a week graph with all missed calls that are post-queue.

What is a "Post Call Queue Missed Call"?
- it is someone who listened to the "this call will be recorded message" and should have started ringing to a rep. If no reps are available at this point, it is a staffing issue to fix.

You can also track **Pre** Call Queue Missed Calls, and show you how to optimize your compliance messaging or Press 1-4+ options to improve getting sales calls answered at a higher rate. Which, in turn, should improve the overall sales, as it prevents shoppers who are calling multiple companies, and you don't answer, and then they just call the next person.

If you set this up, you can see if you are missing calls on lunch breaks, shift changes, or just which days and hours in general have a staffing shortage. Making sure your post call queue missed call rate is under 5% is key. Keep in mind, if you get 4 calls in a midnight hour, and miss 2, you have a 50% missed call rate.
So you can remove shifts you are not open to get more accurate results. But it is also good to see missed calls on your shifts where you are closed, and maybe see if you should put an agent on an overnight shift.

V	W	X	Y	Z	AA	AB	AC	AD
Sum of Abandoned								
Row Labels	1	2	3	4	5	6	7	Grand Total
0	11	8	1	2	2	1	0	25
1	8	5	1	2	1	0	0	17
2	6	3	0	1	2	0	1	13
3	5	3	0	0	0	1	1	10
4	9	4	2	0	2	0	1	18
5	6	4	0	0	2	1	0	13
6	8	4	4	1	4	9	3	33
7	10	9	3	3	8	5	9	47
8	9	14	6	12	5	9	8	63
9	8	8	8	12	5	7	10	58
10	5	14	3	10	6	6	6	50
11	3	3	10	6	2	9	7	40
12	5	5	5	6	7	9	4	41
13	5	16	5	15	8	13	13	75
14	8	9	8	4	9	9	4	51
15	2	6	16	5	9	3	13	54
16	3	7	14	2	14	7	17	64
17	6	1	10	8	8	4	7	44
18	5	11	12	3	15	2	4	52
19	7	4	14	9	2	9	7	52
20	3	10	3	6	5	7	14	48
21	4	4	5	2	6	2	10	33
22	0	2	1	3	1	4	1	12
23	0	0	1	1	0	1	2	5
Grand Total	136	154	132	113	123	118	142	918

AF	AG	AH	AI	AJ	AK	AL	AM	AN
Post Queue Abandoned %								
Hour of Day	**Sun**	**Mon**	**3**	**4**	**5**	**6**	**7**	**Grand Total**
0	73%	73%	4%	11%	14%	8%	0%	
1	44%	31%	10%	13%	9%	0%	0%	
2	60%	50%	0%	8%	11%	0%	6%	
3	45%	15%	0%	0%	0%	7%	6%	
4	22%	11%	8%	0%	8%	0%	4%	
5	7%	4%	0%	0%	6%	3%	0%	
6	13%	4%	4%	1%	7%	10%	6%	
7	11%	4%	1%	2%	4%	2%	16%	
8	7%	3%	2%	3%	1%	2%	7%	
9	6%	2%	2%	3%	1%	2%	7%	
10	4%	5%	1%	4%	2%	2%	4%	
11	3%	1%	2%	2%	1%	3%	5%	
12	4%	2%	2%	2%	3%	3%	3%	
13	6%	5%	2%	6%	4%	4%	12%	
14	7%	3%	4%	2%	4%	4%	4%	
15	2%	3%	7%	3%	4%	1%	12%	
16	3%	4%	9%	1%	8%	5%	14%	
17	6%	1%	8%	6%	6%	4%	6%	
18	6%	9%	9%	3%	16%	3%	5%	
19	8%	3%	9%	10%	3%	14%	8%	
20	4%	9%	3%	8%	6%	8%	15%	
21	8%	6%	9%	2%	10%	3%	16%	
22	0%	5%	4%	7%	3%	16%	4%	
23	0%	0%	5%	6%	0%	3%	17%	
Grand Total	**8%**	**4%**	**4%**	**3%**	**4%**	**4%**	**8%**	

CASE STUDY 6

We had one client that had a 25% missed call rate on total calls, and then 14% on new callers calls post-queue. They are a 24/7 call center, and a few things were used to improve their missed call times.
We went from a hard switch on their shifts (8a-4p + 4p-12a + 12-8a) to have some employees overlapping. So some employees would come in at 8am, but then others would come in at 9am. As staff would get ready to log off, or start their day with their outbounds, so inbound missed calls would be missed at a higher rate.

Then there was the simple fix of most people taking a lunch break around the same time. So we staffed up during lunch as well. This dropped their most recent average missed call rate post-queue to 4%.

- **What is your missed call rate pre and post call queue?**
- **If you improve your missed calls on new inbound callers, how many extra deals can you potentially capture?**

Configuration No. 7: **Non-Qualified Reasons on Inbound Calls**

This is a source of truth in your leads. It is good to have this to track Rep and Marketing Source performance.

Are Reps Disqualifying Too Easy?
You can see if reps are too easily disqualifying people. Look at their percentage of leads that are non-qualified, as compared to their total leads. And if there are anomalies with some specific agents, there may be some training there to do.

Email Campaign on Closed Lost Opportunities:
You can also start Non-Qualified campaigns. Let me show you some examples below.

The below non-qualified reasons are for a private substance abuse treatment facility below. You could make email campaigns based on the following unqualified reasons:

- Doesn't Want Help At This Time
- Unable to Reach
- Wants Meetings Only
- Went Elsewhere
- Won't Travel

If you have a previously qualified person who is marked as Closed Lost by an agent, with one of the above 5 non-qualified reasons, you should have some automated email campaigns to try to re-engage the person over time.

Total Non-Qualified Reasons Examples for an Addiction Treatment Facility:

We put in the bold the values where we would send them emails over time after being marked as Closed Lost for one of those 5 reasons.

- Doesn't Want Help At This Time
- Insurance Related
- Client is Sober
- Probation
- Referred Out
- Unable to Reach
- Wants IOP/Sober Living
- Wants Meetings Only
- Went Elsewhere
- Won't Travel
- Insufficient Insurance Benefits
- Other

And here below we would send them emails 3 days, 120 days, 150, 270, and 365 days later with automated emails. When we set this up, there is almost always some type of engagement that leads to a purchase of services. And it is a one-time set up that we create, and then monitor via reports.

Email Template Name
After 3 days being Marked "Lost"
After 120 days being marked "Lost"
After 150 days being marked "Lost"
After 270 days being marked "Lost"
After 365 days being marked "Lost"

CASE STUDY 7

We set up the above for a client, where we emailed them exactly like you see in the screenshot above - 5 emails sent to people after they were marked Closed Lost.

This client is in the healthcare space with an average revenue of $28,000 per new client. They are receiving 1 new client per month from old leads that were marked as Closed Lost, as a direct impact from this email automation.

The clients receive the email, and they call in. Some convert, some don't.
But there is an additional $28,000 per month in revenue after this one-time set up.
Now we just monitor and change the content of the emails for testing.

- **Are you tracking the reasons that leads are not qualified?**
- **If so, can you come up with email campaign ideas to re-engage or further qualify them?**
- **How many leads do you disqualify per month?**
- **And can we re-engage them?**
- **How many extra deals do you think you could pull back in?**

That's it folks. No more lessons.

These are the top seven ways your company can maximize your CRM to optimize lead management and **make more profits.**

Closing Notes

1 Engagement / Further Questions:

If you can do this – go back to that Facebook or Instagram post you found us on (ignore this if you found this via some other channel). On that FB/IG post, comment your thoughts on this eBook.

Let others know what you think about it. If you see areas to improve, or want to talk about the eBook in general, send me an email (johnny@journeysthroughsearch.com)
– I'm happy to discuss ideas.

We're also available to set up any of these integrations, or almost any integration your company may need between various systems. Let me know if you would like a chat about what you are working on or would like to integrate.

2 Share this eBook:

If you think there is someone you know that could benefit from this eBook. Share it with them. Remember, they can hire us to set this stuff up, or do it themselves.

3 BONUS – Guidelines for HIPAA-Compliant SMS Setup

If you would like another PDF – "Guidelines for HIPAA-Compliant SMS Setup" –
send me a message. Same email as above (johnny@journeysthroughsearch.com).
If you email me, I'll go ahead and send over a document that discusses employee training on SMS compliance & how to make a website and call center compliant.

All requires a double opt-in for SMS for healthcare, and it helps to do the same outside of healthcare. I mean, this is to make sure people agree to an SMS from your business
– pretty straightforward!

Johnny G.

Johnny Gallo

Have any questions about the stuff in this eBook or your business,
give me a call or chat with us on the website

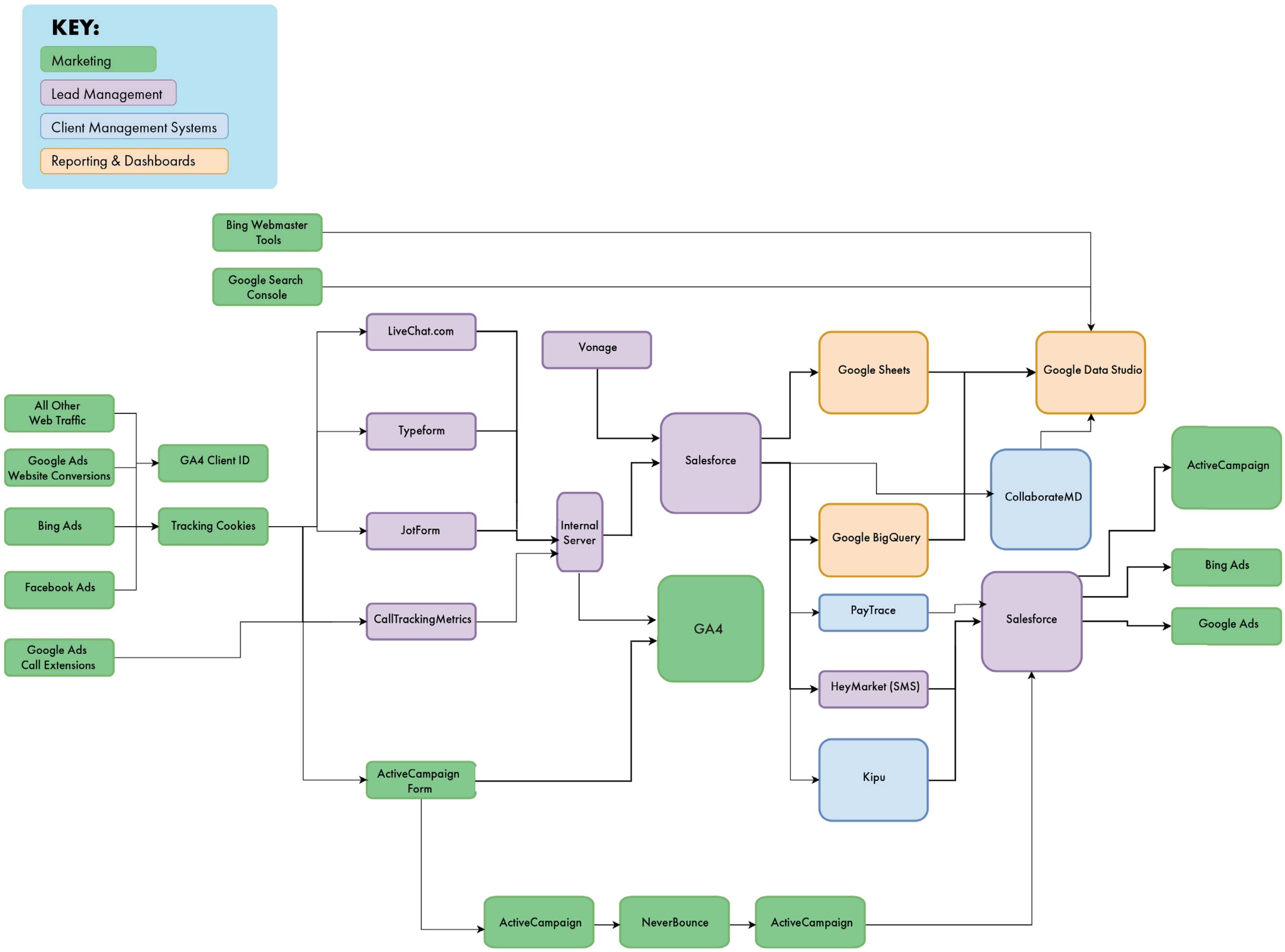
855-550-1966

www.JourneysThroughSearch.com

Having mentioned the 7 key ideas above, it is important to note that, in reality, without the right system integration, taking full advantage of these configuarations would be impossible. With that in mind, let's talk about integrations and how they pull all the 7 concepts discussed above together efficiently.

Example Client Systems Integrations:

Below is a flowchart showing all the systems integrations for one of our clients (they own substance abuse & mental health treatment centers). The goal is for you to get at least a few of these integrations in place. So that you can start making some moves like our client below! We organized a list of the systems they use, and how they are integrated with each other:



- **All Other Web Traffic -**
  We track and push all online leads into their CRM, channels like directories, Google My Business, SEO.
- **Google Ads Website Conversions -**
  We capture the Google Click ID (GCLID) to push offline conversions from the CRM to Google Ads.
- **Google Ads Call Extensions -**
  When we create new leads in the CRM from first time callers, we store the Original Phone Number + Call Start and End times as well, to push offline conversions from the CRM back into Google Ads.
- **Bing Ads -**
  We capture the keyword and campaign information, and store it in the CRM for reporting. We also store the Microsoft Click ID (MSCLKID) to push back offline conversions from the CRM to Bing Ads.
- **Facebook Ads (+ Instagram Ads) -**
  We track if a lead came in via IG or FB, and same thing here, pushing offline conversions back from the CRM. We also push Facebook Lead Forms directly into the CRM as new Leads.
- **GA4 -**
  We measure events in GA4 to provide insights for conversions on your website.
- **Tracking Cookies -**
  We have custom cookies that are attached to each visitor of the website. It will store the Landing Page URL and Referring Domain of the user. With this information, we can capture the UTM tracking parameters and referral source of the visitor. And then apply analysis to campaigns for Cost per Lead, Qualified Lead, and Sale.
- **Bing Webmaster Tools -**
  Tracking page rankings and SEO traffic in Bing. Then we report this data on a custom dashboard in Google Looker Studio. We connect your Brand and Non-Brand pages with traffic and revenue within the CRM.
- **Google Search Console -**
  We pull in your Brand and Non-Brand traffic from Google to a dashboard for analysis (showing revenue on non-brand pages).
- **ActiveCampaign Form -**
  Form on the website to capture email subscribers.
- **ActiveCampaign -**
  The CRM is directly connected to ActiveCampaign for email drip campaigns. When users are in one Lead Status, they get a certain drip campaign / added to a certain list (Example lists = New Lead, Qualified Leads (unconverted), Converted Leads).
- **NeverBounce -**
  We automatically clean up any email that comes into the CRM before we email it, that way we know we aren't emailing bad emails.

Lead Management Systems:

- **LiveChat.com -**
  You should have live chat on your website if you are generating leads through digital marketing campaigns. Here we directly integrate it with the CRM (new leads created, chat transcripts pushed to the CRM).
- **Typeform -**
  Create new leads in the CRM from web forms with all marketing info (UTM parameters + referring domain).
- **JotForm -**
  Same as Typeform, create new leads in the CRM.
- **CallTrackingMetrics -**
  Phone system to track marketing information on digital campaigns, create new leads in theCRM, and Internal Server (Azure) - We will push all lead types (calls, forms, chats) to an Azure server first, and this will do various things (check for duplicate leads in the CRM, send out SMS or email automations to internal users or the potential customer who completed the lead). Think of it like a CRM outside your CRM.
- **Vonage -**
  Older phone system integrated with the CRM to create new leads and track phone activity.
- **Salesforce -**
  The CRM of CRMs. This is where we store all client info, and it is the database of all automations connected to it.

Reporting Dashboards

- **Google Sheets -**
  We store some information here to display on the dashboard.
- **BigQuery -**
  For large datasets, we store data here, from the phone systems and CRM, to show on the dashboard.
- **Google Looker Studio -**
  This is one of the final stops for the data where we report on various campaigns and call center KPIs (key performance indicators).
- **CollaborateMD -**
  This is a billing company for Insurance Payments. We connect this platform with the CRM and EMR to push payment information to the CRM. We then calculate balance due client from connecting to the Credit Card processor to show historical payments + insurance payments. We also calculate ROI on marketing campaigns.

- **PayTrace -**

  We integrated this credit card processing system to carry out one-time and recurring payments. Since we also integrate the EMR medical records with the CRM, we are able to see the Admission and e Discharge Date. We then look at the Payment Date and who ran the payment, and then show reports with total payment before becoming a client, total payments while in the inpatient facility, and then total payments post-care.

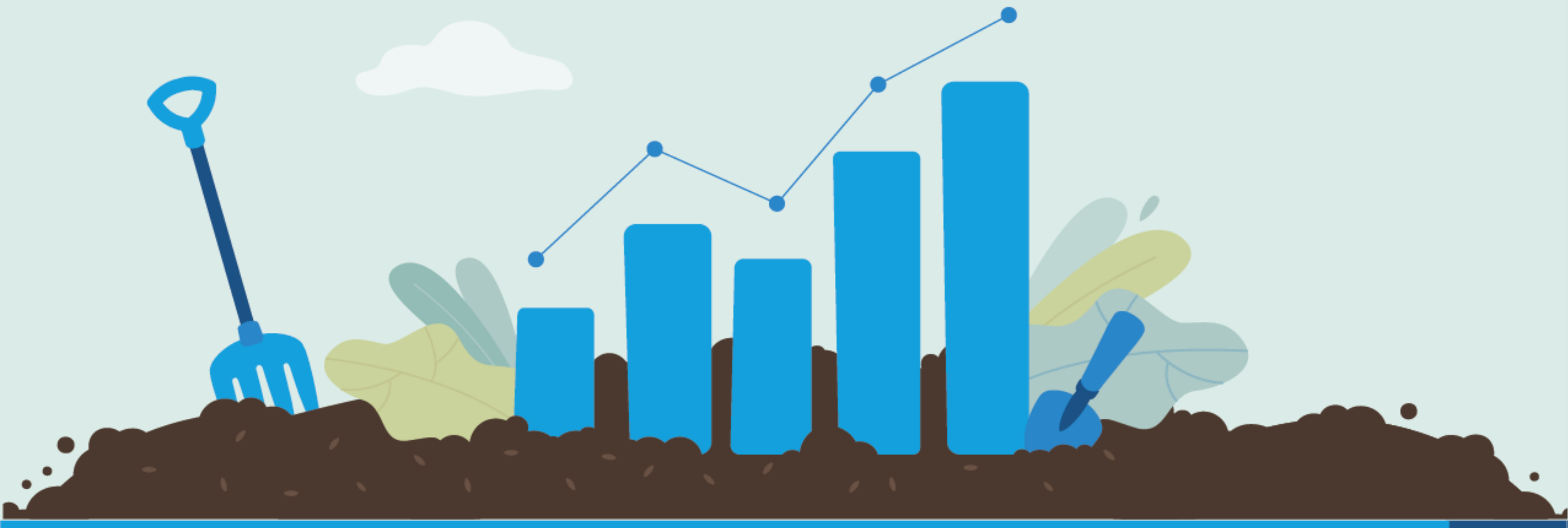
- **Kipu -**

  This is the EMR (electronic medical records) that is connected to the CRM. When a person becomes a new client, we automatically create a record in the EMR for the client, and alert the clinical team. We then pull over the clients Program History and start/finish dates over to the CRM to continue communication post-treatment and to understand what programs the client took part in.

From the above systems being connected, talking to each other, all automated in one way or another, we can easily manage the below 7 areas, that, I believe, a re core to any business that takes call center and marketing management seriously.

From the above systems being connected,
How can you spend 10s of thousands or even millions of dollars without doing the above.
It is like buying the best flowers to put into a trash heap of plastic and garbage.
You need to have great garden soil, nutrients, water, & light in order for your plants to flourish.

The same goes for your reps and marketing.
We need to give them the systems they need to flourish.



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Do you need an alternative solution?

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