



Fast Track Packs

When you invest in call tracking, it's important to position your business for success from the start. Our professional services and support teams are here to help you get started, and we'll support you every step of the way with customized training and account implementation.

PLANS START AT

\$2,000

TIMELINES

30–60
days

EXPRESS PACK

Get started with a 30-day custom onboarding to identify your goals and build out your account to meet those immediate objectives.

REMOTE PACK

Tailored onboarding to set your remote team up for success, configuring essential tools like the cloud-based softphone.

PROFESSIONAL PACK

Dive deeper into complex routing, tags, and workflows for your organization with additional optimizations, testing, and evaluation before launch.

PROFESSIONAL PLUS PACK

Train your organization for long-term success and have free range to configure as many advanced integrations and customizations as you need.

Fast Track Timelines

30 DAYS

45 DAYS

60 DAYS

EXPRESS

Custom onboarding

consultation • configuration & testing • wrap-up

REMOTE

Custom onboarding for remote teams

consultation • configuration & testing • wrap-up

PROFESSIONAL

Onboarding and implementation

consultation • configuration & testing • optimization • training & wrap-up

PROFESSIONAL PLUS

Onboarding & advanced implementation

consultation • configuration • integration set-up • testing • optimization • training • wrap-up

OUR PROCESS

Our Fast Track Packs are designed to get your CTM account up quickly and working the way you envision. Our first call (the kick-off) will establish that our team understands your objectives, suggests a solution within best practices and schedules subsequent calls and check-ins until all pack items are complete.

We will train you on how to build out your account and record all the calls for future reference. Of course, our support team is also available during this time (and after the pack is complete) as a resource for quick questions.

	EXPRESS	REMOTE	PROFESSIONAL	PROFESSIONAL PLUS
Kick-off orientation call	Included	Included	Included	Included
User set-up	Standard roles	Standard and access control groups (up to 5)	Standard and access control groups (up to 5)	Standard and access control groups (up to 50)
Creation of sub-accounts	Up to 20 (standard billing)	Up to 35 (standard billing)	Up to 50 (standard billing)	Unlimited (custom billing)
Guided porting process	250 numbers included	500 numbers included	1500 numbers included	2500 numbers included
Purchasing of tracking numbers with source and routing configuration	Up to 25 numbers	Up to 75 numbers	Up to 150 numbers	Up to 500 numbers
Creation of custom tracking sources	Up to 5	Up to 5	Up to 25	Unlimited
Receiving number configuration	Up to 1	Up to 5	Up to 25	Unlimited
Adwords/Analytics set-up	Up to 1 account	Up to 5 accounts	Up to 25 accounts	Up to 50 accounts
Overview and configuration of IVR menus	Up to 1	Up to 1	Up to 10	Unlimited
Overview and configuration of voicemail box	Up to 1	Up to 1	Up to 10	Unlimited
Overview and configuration of Advanced Routing	Call Queues (up to 1)	Call Queues, Smart Routers, and Geo Routes (up to 25)	Call Queues, Smart Routers, and Geo Routes (up to 25)	Unlimited
Overview and configuration of triggers	Up to 1	Up to 1	Up to 10	Unlimited
Overview and configuration of notifications	Up to 5	Up to 5	Up to 25	Unlimited
Create tags for classifying interactions	Up to 5	Up to 25	Up to 25	Unlimited
Testing of dynamic number insertion	Up to 5 sites	Up to 1 for each sub-account	Up to 1 for each sub-account	Up to 100 sites
Call flow testing	N/A	Included	Included	Included
Further optimization	N/A	Included	Included	Included
Softphone configuration	N/A	Softphone, team settings & chat (chat license required)	Softphone, team settings & chat (chat license required)	Custom features
Configure/test integrations with Salesforce, Shopify, Bizible, Marin, Zoho CRM, Kenshoo, etc.	N/A	N/A	Salesforce only	Unlimited
Group training sessions	N/A	Up to 2 virtual sessions	Up to 5 virtual sessions	Up to 3 virtual sessions
Overview and configuration of reseller pricing schedules	N/A	N/A	N/A	Up to 5 pricing schedules
	\$2,000	\$3,950	\$5,950	\$12,500



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LEVEL

Express Pack

PLANS START AT

\$2,000

AVERAGE TIMELINE

30 days

Whether you're new to CTM or transitioning from another provider, our team will work with you to identify your goals and help you build out your account to meet your business objectives.

Here's a brief overview of what you can expect throughout the phases of your professional services package:

PHASE ONE

Kick-off orientation call

Standard user set-up

Creation of up to 20 sub-accounts

Guided porting process with up to 250 numbers included

Creation of up to 5 custom tracking sources

Configuration of one receiving number

PHASE TWO

Purchasing of up to 25 tracking numbers with source and routing configuration

Overview and configuration of one trigger

Overview and configuration of one IVR menu

Overview and configuration of one voicemail box

Overview and configuration of one call queue

PHASE THREE

Setup of one Google Adwords / Analytics account

Overview and configuration of up to 5 notifications

Create up to 5 tags for classifying interactions

Testing of dynamic number insertion on up to 5 webpages

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"My experience using CallTrackingMetrics with my team since moving to remote work has been absolutely flawless. The service is seamless with no interruptions or audio issues. I would recommend this product to anyone with a business who needs to work remotely!"

NELLIE TALBERT

Front Office Supervisor,
Fahey Pest & Lawn Solutions

LEVEL

Remote Pack

PLANS START AT

\$3,950

AVERAGE TIMELINE

30 days

Our team knows what it takes to set up a remote contact center. Tailored onboarding to set your remote team up for success, configuring essential tools like the cloud-based softphone.

Here's a brief overview of what you can expect throughout the phases of your professional services package:

PHASE ONE

Kick-off orientation call

Standard user set-up and up to 5 access control groups

Creation of up to 35 sub-accounts

Guided porting process with up to 500 numbers included

Creation of up to 5 custom tracking sources with each sub-account

Configuration of 5 receiving numbers within each subaccount

PHASE TWO

Purchasing of up to 75 tracking numbers with source and routing configuration

Overview and configuration of one trigger within each sub-account

Overview and configuration of one IVR menu within each sub-account

Overview and configuration of one voicemail box within each sub-account

Overview and configuration of 25 call queues, geo-routes, and smart routers

Configure softphone, team settings, and chat* (*chat license required)

PHASE THREE

Integration of up to 5 Google Adwords / Analytics accounts

Two virtual training sessions

Overview and configuration of up to 5 notifications

Create up to 25 tags for classifying interactions

Call flow testing and optimization

Testing of up to 1 Dynamic Number Insertion for each sub-account



Fast Track Packs

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LEVEL

Professional

PLANS START AT

\$5,950

AVERAGE TIMELINE

45 days

Looking for more advanced routing, tags, and workflows for your organization? No problem! Our team will work with you to design and build out your entire communications platform.

Here's a brief overview of what you can expect throughout the phases of your professional services package:

PHASE ONE

Kick-off orientation call

Standard user set-up, and up to 5 access control groups

Creation of up to 50 sub-accounts

Guided porting process with up to 1500 numbers included

Creation of up to 25 custom tracking sources

Configuration of up to 5 receiving numbers within each sub-account

PHASE TWO

Purchasing of up to 150 tracking numbers with source and routing configuration

Call flow testing

Overview and configuration of up to 10 triggers

Overview and configuration of up to 10 IVR menus

Overview and configuration of up to 10 voicemail boxes

Overview and configuration of up to 25 Call Queues, Geo Routes, and Smart Routes

PHASE THREE

Setup of up to 5 Google Adwords and Analytics accounts

Up to 2 virtual training sessions

Overview and configuration of up to 5 notifications

Create up to 25 tags for classifying interactions

Softphone configuration with standard features included

Testing of up to 1 Dynamic Number Insertion for each sub-account



Fast Track Packs

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LEVEL

Professional Plus

PLANS START AT

\$12,500

AVERAGE TIMELINE

60 days

Need to send call data into your other tools? Let our team of experts configure advanced integrations such as Salesforce and Stripe, while training your organization for long term success.

Here's a brief overview of what you can expect throughout the phases of your professional services package:

PHASE ONE

- Kick-off orientation call
- Creation of unlimited sub-accounts
- Creation of unlimited custom tracking sources
- Configuration of unlimited receiving numbers
- Guided porting process with 2,500 numbers included
- Overview and configuration of unlimited voicemail boxes

PHASE TWO

- Purchasing of up to 500 tracking numbers with source and routing configuration
- Standard user set-up, and up to 50 access control groups
- Setup of up to 50 Google Adwords / Analytics accounts
- Configure and test integrations with Salesforce, Shopify, Bizible, Zoho CRM, etc.
- Overview and configuration of unlimited Call Queues, Geo Routes, and Smart Routes
- Overview and configuration of unlimited IVR menus
- Overview and configuration of unlimited triggers
- Configure softphone, team settings, & chat (chat licences required). Custom features included.
- Call flow testing

PHASE THREE

- Overview and configuration of unlimited notifications
- Overview and configuration of up to 5 reseller pricing schedules
- Testing of dynamic number insertion on up to 100 webpages
- Create unlimited tags for classifying interactions
- Up to five virtual training sessions (held during any phase)
- Further optimization