



How call tracking data can help solve Sales-Marketing misalignment



Custom content for CallTrackingMetrics by studioID

When sales and marketing teams are not in sync, an entire organization can feel the friction – impacting ROI, growth targets and goals – with dire consequences.

According to [research](#) conducted in 2020 by LinkedIn and Forrester, 85% of sales and marketing leaders say sales and marketing alignment is the largest opportunity for improving business performance. However, that research also showed that 9 out of 10 sales and marketing professionals reported being misaligned across strategy, process, content and culture. Also disconcerting, 98% and 97% of respondents (sellers and marketers respectively) said poor alignment negatively impacts not only the business but also the customer.

“If these teams are not aligned, they’re usually not meeting all of their goals,” said Chris Todd, Senior Manager of Demand Generation at CallTrackingMetrics. “They find themselves pointing fingers. The sales team might be working toward one specific KPI, while the marketing team is working toward a different KPI, and these targets don’t ladder up to the same goal. So both teams could end up hitting their KPIs and still not moving the needle for the company at all. It can be really frustrating.”

It’s an age-old problem. But as technology has evolved, organizations have found a new way of tackling it, using call tracking – and conversation tracking – data.

9 out of 10 sales and marketing professionals reported being misaligned across strategy, process, content and culture.



“Call tracking isn’t just about calls anymore,” Todd said. “You’re getting data from live chats, social media platforms, form submissions, text messages... just about all of the conversations you are having with customers can supply this kind of rich data.”

As a result, he said, sales and marketing teams can use this data not only for future planning, but also in real time, helping drive better cohesion.

What does this look like in practice? **Here are five ways call tracking data can be used to bring teams together.**

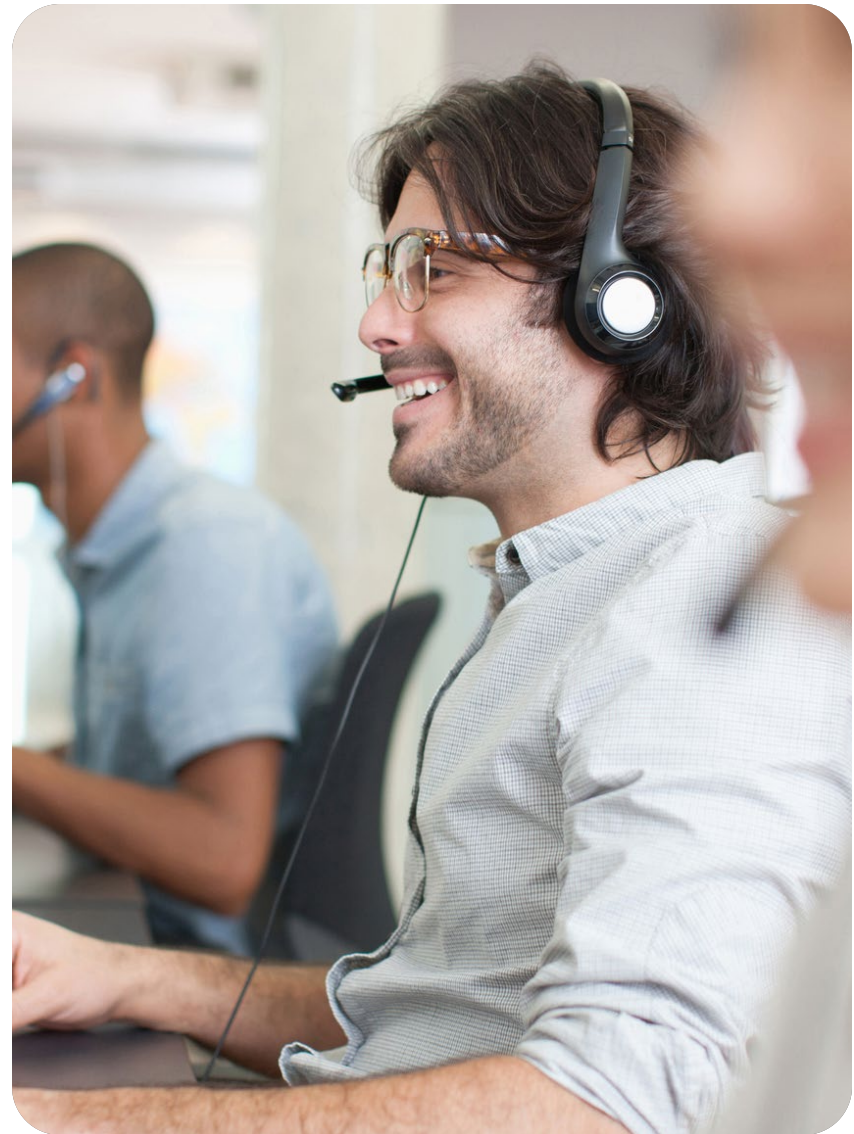
1

Call scoring and attribution

As customer interactions take place, data can be gathered that allows teams to “score” or rate the success of the conversation. For Long Home Products, a home improvement company specializing in doors, windows and bathrooms across the Mid-Atlantic, this means having call center agents score each call and look for trends.

For example, the call scoring data might uncover a pattern in which agents are speaking with prospective clients who rent, rather than own, their homes. Since the core customer base for Long Home Products is homeowners, John DePaola, Jr., Long Home Products’ Director of IT and Marketing, said this kind of call scoring data can help him see whether the leads coming from marketing activities are qualified. If call volume trends somehow were showing a propensity toward renters, something would have to be adjusted, he said.

Todd said he has seen scoring be extremely helpful in this regard, getting sales and marketing teams on the same page in problem solving and determining the best course of action to take. Does the marketing messaging need to be adjusted? Or, perhaps, depending



on what the data is showing, sales teams may need to adjust how they are steering conversations. The call scoring data allows both teams to see what is happening and make decisions based on a single source of truth, he said.

Marketing attribution data also plays a key role in this area, he said. As teams examine call scoring trends, they also will want to take a look at the sources from which those calls are originating.

"This adds a layer of quality to what teams might be looking at in their Google Ads platform or Facebook advertising platform," Todd said. "Now you can look and say, 'We have a hundred leads from Campaign A, and only 25 from Campaign B.' If you're only looking in Google Ads, you might say, 'Let's shut down Campaign B and throw all the money in Campaign A, because it's doing better.' But with call tracking and call scoring, you can say, 'Oh, actually we looked at it in the reporting and the call tracking platform and the calls average a score of three out of five in Campaign A and five out of five in Campaign B.' And now your decision is to potentially shift to Campaign B instead, because that's actually where your ideal customer is coming from."

For DePaola, a lot of marketing attribution comes down to dynamic phone numbers, another area call tracking data supports.

"Our internet team uses a lot of dynamic numbers and session data from our website," he said. "So while our website might be hard coded with a number, we have some rules in CallTrackingMetrics that if [customers] came to our website from an originating source, that originating source's number will show on our website and replace what's hard coded. This gives us better insight into where callers come from and improves attribution."





Follow-up

Defining the right process for following up with customers after an interaction is also a way to get sales and marketing teams working together. Again, Todd said, this is enhanced by call tracking data.

“There are some really cool things you can set up,” Todd said. “You can customize what you want, which is really helpful.”

Call data can be sent to an organization’s CRM, and then be set to automatically schedule follow-up calls when a sales team member logs into the system, Todd said.

“This way, you’re ready to have the conversation and all that context and conversation history is still there.”

Meanwhile, through automated workflows, call data can connect with tools used by marketing teams (HubSpot or Salesforce, for example) and trigger tasks such as follow-up email campaigns. Or, in the case of Long Home Products, tags can be applied so missed calls won’t become missed opportunities.

“We do have people that will reach out after hours, and hopefully leave a voicemail,” DePaola said. “With call tracking data and an automated system, it’s easy for our people to reach back out the next day to engage those customers again.”

Similarly, he said, his company is supported by call tracking follow-up capabilities through leads from third-party sources such as Home Advisor.

“So for example, if someone fills out a form on Home Advisor looking for a new roof, they are going to get calls from 10 different companies, immediately,” he said. “And we’re likely to be one of those companies calling. CallTrackingMetrics helps us collect the right data and connect with those people to set our appointments.”

“With call tracking data and an automated system, it’s easy for our people to reach back out the next day to engage those customers again.”

— **John DePaola, Jr., Long Home Products’
Director of IT and Marketing**



3

Transcriptions

Call transcriptions can also be used to drive sales and marketing alignment, but the key is to use them as a coaching tool, Todd said.

One way to do this is by scheduling regular transcription review sessions with sales and marketing teams, where they can hear first-hand how customers are interacting on calls. With both sales and marketing teams involved, these sessions are great for gauging how these customer interactions are impacting conversion rates and what can be done on the sales or marketing side to improve outcomes.

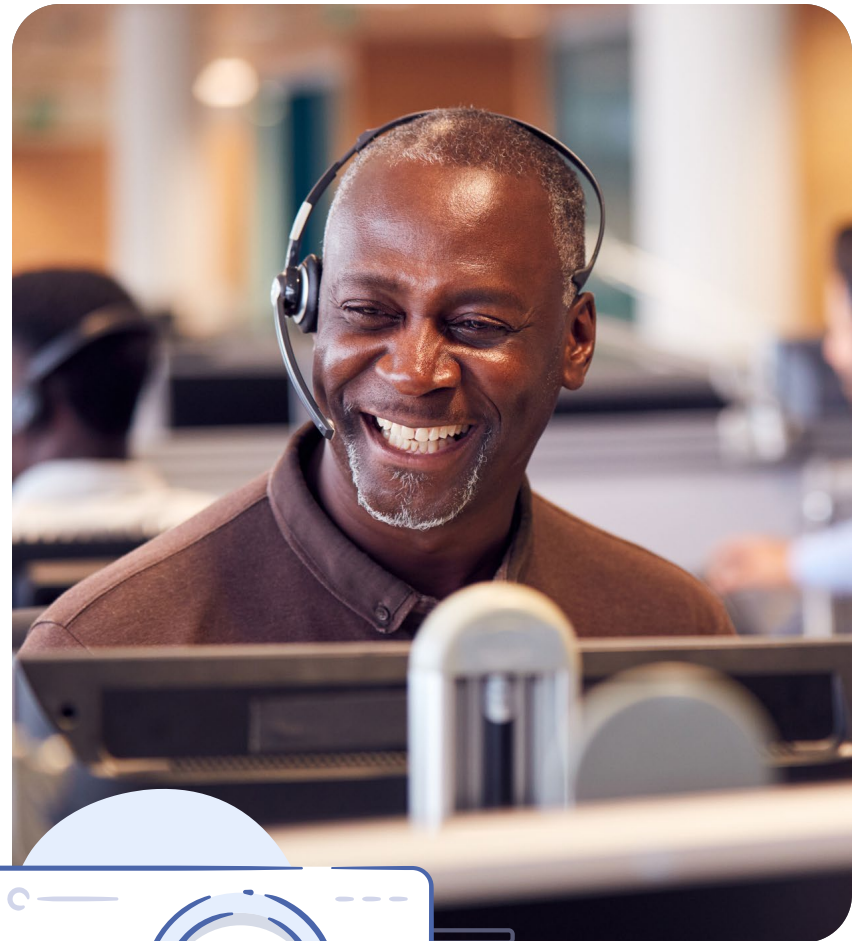
Another way to use transcriptions in coaching is to glean automated insights from the transcriptions and drill down into data that can be useful to both teams. For example, through keyword spotting, teams can automatically pinpoint different words and phrases and uncover opportunities.

Disgruntled customers can be flagged to be given more attention or escalated to different specialists, Todd said. Meanwhile, customers identified as happy by their use of positive keywords might be set up for retargeting to increase conversion that way.

"You can see things like what product they are talking about," Todd said, and then align on decisions about what to do in those situations. "If they're talking about one product, for example, maybe you'll decide to set up a follow-up to talk about Product B, or upsell to a different product. ... We encourage teams to really start thinking about what kind of outcomes they want, and then start picking up phrases that are common and start automating it through."

He recalls a recent CallTrackingMetrics customer who, once they started to review transcriptions, saw clear patterns of people asking the same questions around products they did not offer. The business used this data to innovate, pulling together different teams and determining which new items to add to their product line, Todd said.

"If call data was just coming from one salesperson, they might not have known that it was a pattern," he said. "That's a cool example of something that could come from transcriptions and really impact a business. ... Conversion rates go up and everybody's happy."



4

Personalization and customer experience

According to McKinsey, personalization must become the core driver of how companies approach marketing in the future if they are to be successful. And with third-party cookies phasing out while first-party data ‘reigns supreme,’ really knowing and understanding customer preferences will only continue to rise in importance.

But personalization – and its impact on the overall customer experience – is another area where call tracking data can be used to drive alignment between sales and marketing teams. Best-in-class systems automate this process, and help teams better identify buyer personas, Todd said.

This allows marketing to become more personalized and targeted, which in turn, helps sales with conversion, he said. Sophisticated call tracking systems can conditionally route calls, texts, chats and forms, and do so based on a caller’s online activity, their history with a company, demographic information or custom fields that sales and marketing teams select. This way, high-value customers can be automatically identified, appending a score when a call meets certain criteria, such as talk time or when certain keywords are spoken.

But personalization – and its impact on the overall customer experience – is another area where call tracking data can be used to **drive alignment between sales and marketing teams.**

By automating workflows so call tracking ties into other platforms such as HubSpot or Salesforce, the call tracking data can be used to increase the accuracy of audience segmentation, improving outcomes and results for both sales and marketing, Todd said.

“You can now set up audiences where, for example, let’s say it’s someone who has made a phone call and has visited 20-plus pages (of your website),” he said. “And you can put them in a specific list to either retarget or send relevant display ads, giving you this really personalized outreach.”

5

Unified Communications in one Platform

But perhaps the most important tool in driving alignment between sales and marketing through call tracking data is providing both teams with a single source of truth, Todd said.

“Teams definitely work day-to-day in different platforms,” he said. “And then they can all look at CallTrackingMetrics and see the same thing -- that’s where it’s really important. The alignment comes from owning that data, where sales can see they’re having lots of conversations, and they can see where the quality conversations are coming from -- whether that’s through paid search or a Facebook ad, or something else.”



For DePaola, this means having call tracking data points together with CRM data front-and-center on screens around his call center.

These screens and the software behind them help everyone stay on the same page and on target, he said.

“Call tracking is a huge part of that,” he said.

When different teams can access and share data seamlessly while analyzing the content of calls, texts, chats and forms to capture detailed data, the information can provide guidance on how to grow revenue and better support customers, Todd said.

“And just knowing that information kind of brings the two teams together because they’re seeing the direct impact of the marketing team, and now sales are having good conversations with the ability to close.”

“Teams definitely work day-to-day in different platforms,” he said. “And then they can all look at CallTrackingMetrics and see the same thing -- that’s where it’s really important.”

— **Chris Todd, Senior Manager of Demand Generation at CallTrackingMetrics.**



Bringing it all together

Call tracking data can be a single source of truth for both sales and marketing, and the trick is getting the most out of your data.

"It definitely works across industries," Todd said. "There's not a one-size-fits-all for call tracking." The key lies in using this information to get sales and marketing communicating with each other in ways that benefit not only both teams, but also broader business goals.

"It sets up goodwill," Todd said of call tracking data. "Then, the conversations you can have around it are what really drives alignment. And the marketing attribution piece is such a big part of it, because for so long teams have struggled with connecting those dots. So to be able to do that, I think, is huge."



CallTrackingMetrics is the only digital platform that uses call tracking intelligence to inform contact center automation—resulting in a more personalized customer experience. Discover which marketing campaigns are generating leads and conversions, and use that data to automate call flows and power your contact center. More than 100,000 users around the globe trust CallTrackingMetrics to manage communications for their marketing, sales, and service teams.

CallTrackingMetrics has also been recognized in Inc. Magazine's 5000™ list of fastest growing private companies, and as a leader on G2 and Gartner for call tracking, contact center, and unified communications software.

[Learn More](#)

studio / ID

BY INDUSTRY DIVE

studioID is Industry Dive's global content studio offering brands an ROI rich tool kit: Deep industry expertise, first-party audience insights, an editorial approach to brand storytelling, and targeted distribution capabilities. Our trusted in-house content marketers help brands power insights-fueled content programs that nurture prospects and customers from discovery through to purchase, connecting brand to demand.

[**LEARN MORE**](#)