



Ad Tracking Grows Up:

How to use telephone
services to manage
customer relationships

By David Carter

Founder and President, Callbright

Ad Tracking Grows Up

"Set up your business so that an idiot could run it because some day, one will."

Warren Buffet, 2008

Today's Goals

- Use technology throughout “full prospect lifecycle”
- Provide tools for “total employee accountability”
- Understand latest call tracking technologies
- Outline CRM + telephone integration
- Crawl, walk, run implementation plan

Introductions

David Carter

- Founder/President of Callbright
- Telephone industry for 20 years
- First carrier based phone system
- Philosophy
 - CRM must track all customer communications
 - Real time data provides maximum benefit

Integration Sources

CRM / Lead Management / DMS



- Telephone technology will touch all of these sources
- Confirm all “touch points” follow same process

Manage Customer Relationships with Visibility to All Touch Points

- Utilize telephone integration with:
 - CRM
 - DMS
 - Lead management
- Track full prospect lifecycle
 - Improves close rate
 - Enables responsiveness
 - Enhances marketing



CRM Implementation Concerns

- Trapped in mediocrity
 - Total failures are rare. Maximizing benefits is more rare.
- Need long-term accurate information to understand full customer lifecycle
- Need real time information to improve sales instead of just generating reports
- Need automated data collection that doesn't rely on employees to monitor themselves

Industry Infancy Means Opportunity

- Henry Ford forgot to put a reverse gear on his first car.
- Michael Jordan was cut from his high school basketball team.
- Elvis Presley didn't make the glee club.
- The Beatles were turned down for a recording contract by Decca Records.
- Babe Ruth struck out 1330 times, a major league record at the time.

Telephone Platforms

- PBX – phone system
 - Pros: no monthly fees, works with all calls
 - Cons: ongoing management, limited integration, difficult to upgrade
- “Black Box” – SMDR data out of PBX
 - Pros: no monthly fees, works with all calls
 - Cons: ongoing management, limited integration, difficult to upgrade
- Carrier Service – hosted providers
 - Pros: works with any phone system, constant updates, industry integration, managed service
 - Cons: monthly fee, cost for outbound calling

What is Call Tracking Integration?

Current standards

- After call ends
 - Email or IP post to CRM
 - ADF standard lead format

New technology

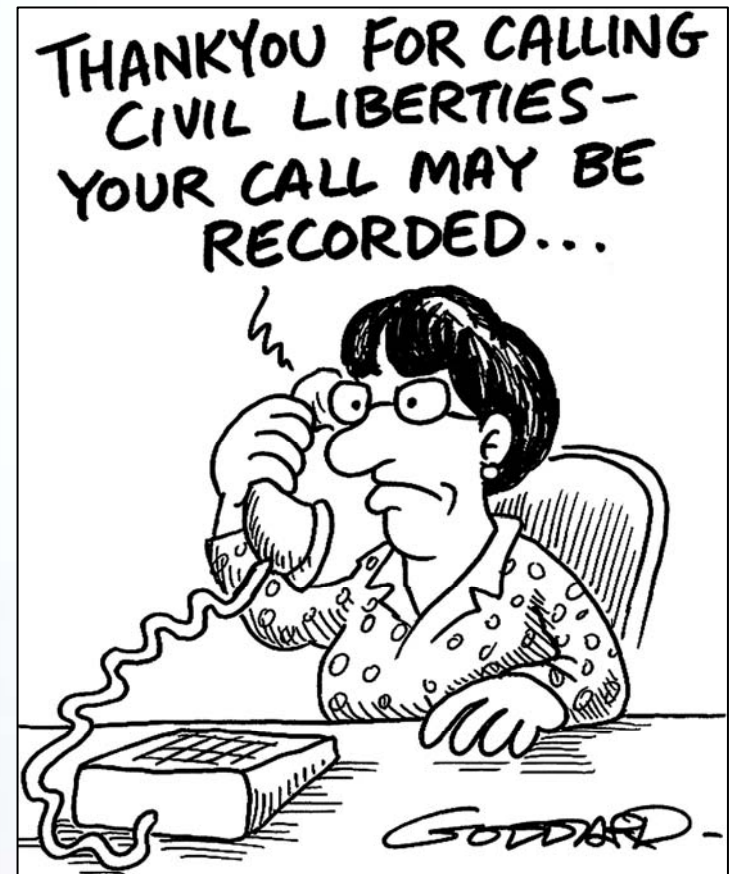
- Multiple call events (before, during, after call)
- Screen pop CRM data
- Real time demographic information
- Click-to-call from CRM
- Automated broadcast triggers from CRM/DMS
 - Thanks for purchase, service is complete, part is ready

Ad Tracking History

- Two major providers:
 - Callbright
 - Who's Calling
- Inbound call focus
- Advertising tracking “pie chart report”
- Call recording occasionally replayed
- After the fact – reporting tool
- “Integration”- actually export, import

Call Tracking

- No customer opposition
- No legislative concerns



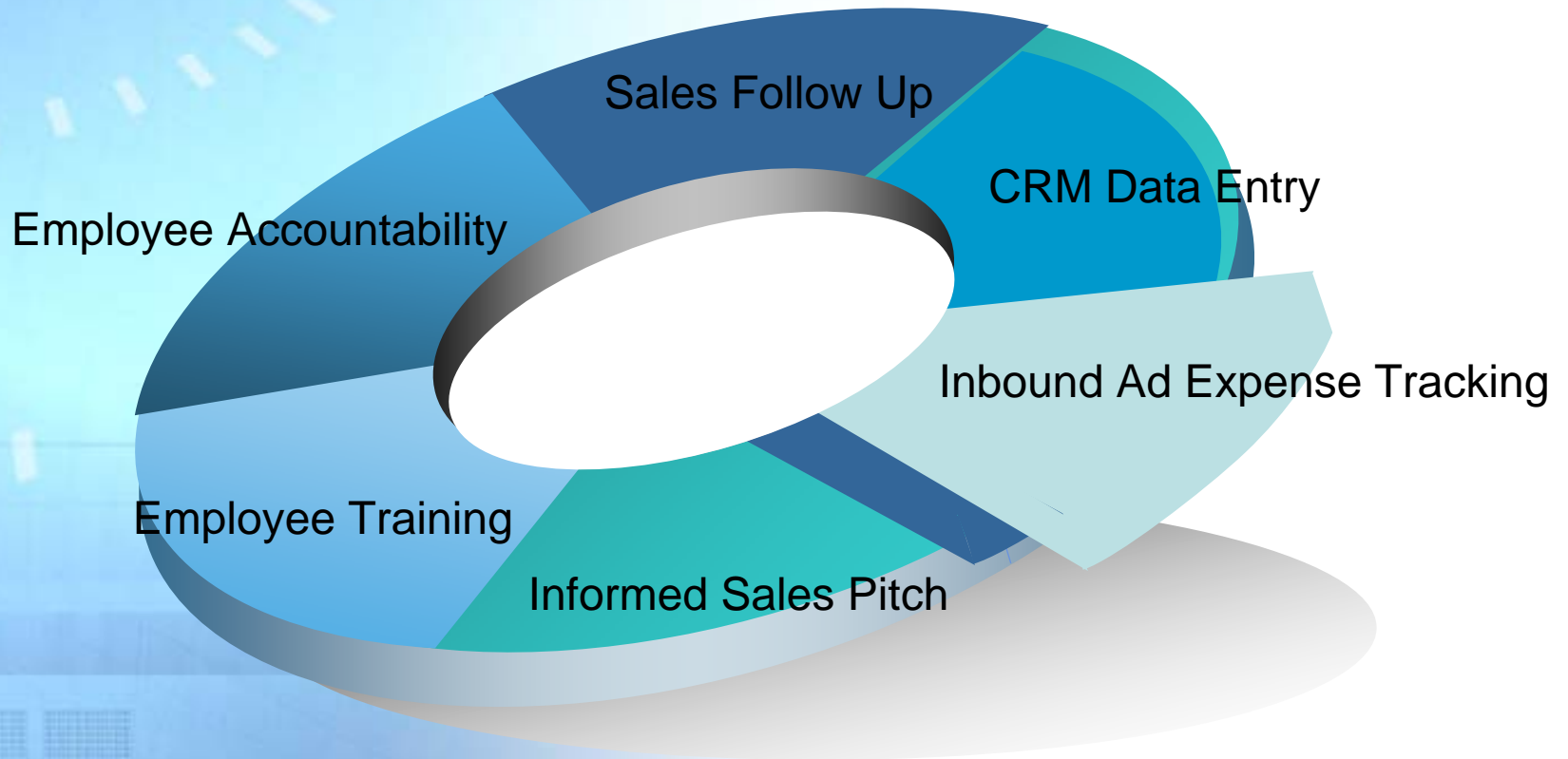
Telephone Tracking Breakdown

- Inbound calling
- Outbound calling
- Pre-recorded messaging – broadcasts
- Form to phone – email and Web forms become phone calls

Inbound Call Tracking

- Count inbound calls by source
- Record conversation
- Identify employee taking call
- Caller name/address + demographics
- Action item:
 - Monitor daily for fast strategy change and callback

Maximize the Inbound Value



Check Demographics and Outlying Data

- Run reports for ad response demographics
- Run reports for outlying calling patterns
 - Multiple callers
 - Time of day patterns
 - Day of week patterns
 - Long duration calls

Outbound Call Tracking

- Click-to-call button in CRM/DMS
 - “Just click” efficient mindset
 - Automated data entry
 - Additional data fields
 - Talk time
 - Answering machines reached
 - 100% accountability
- Personalized messaging (voice mail)

Automate Outbound Messaging

- How often do you leave voicemails?

All the time:	44%
Sometimes:	42%
Rarely:	10%
Never:	2%

- Implement process automation and record keeping
- Script best practices across team
- Use technology to automate playback and tracking

Pre-Recorded Messaging

New FTC regulations:

August 19, 2008

- Signed agreement to authorize calls

September 1, 2009

- Agreement must include phone number
- Current business relationship not strong enough
- Must include automated opt-out mechanism at start

December 1, 2008

- **ACTION** – Change contracts now!

Pre-Recorded Messaging

- Appropriate Uses – good touch points
 - Targeted sales message
 - New model arrival, unable to contact, etc.
 - Recall information
 - Parts are ready
 - Service appointment reminders
 - Car ready for pickup
- New regulations will help improve satisfaction
- Scripted touch points build relationship throughout customer life cycle

Web Contact Increasing

- Customers want immediate response
- Customers will move quickly to competitors
- Move web shoppers to direct sales while they are actively shopping



DealerAdvantage (Cars.com) Interview

Todd Cahan, Max Madsen Mitsubishi

DealerAdvantage:

What changes are you seeing in car-shopper behavior when they respond to your listings?

Cahan:

One of the shifts that I have seen on the Internet is the shift from email communication back to old-fashioned telephone communication...people have learned that as fast as an email is, it's not quite as fast as picking up the telephone to get the information they want...

When you have someone who is really ready to rock 'n' roll, the telephone is the quickest way to get in touch with them.

Web Site Click to Call

- Clickable button on all web pages and emails
 - Prospect and Dealer receive calls at same time
- Benefits:
 - Approximately 5% prefer to click instead of dial
 - Capture more data on source of lead

Form to Phone

A screenshot of the AutoNation website. The top navigation bar includes links for HOME, FIND YOUR VEHICLE, RESEARCH, FINANCE & INSURANCE, SERVICE & PARTS, and FIND A DEALER. Below this are logos for various car brands: ACURA, Audi, BMW, FORD, HONDA, JEEP, CHEVROLET, and CHRYSLER. The main content area features a search form titled 'FIND YOUR NEW OR USED VEHICLE' with options for 'BY MAKE & MODEL', 'BY VEHICLE TYPE', and 'BY PAYMENT'. There are dropdown menus for 'Make' and 'Model', and a 'Zip Code' field. A 'SEARCH NOW' button is present. To the right is a banner for 'Convenience' with the text 'With more than 200 locations there is a store near you.' Below the search form are sections for 'GET YOUR FREE PRICE QUOTE', 'SPECIALS & NEW OFFERS' (featuring an Acura MDX), and 'CAR BUYING & SERVICE TOOLS'.

"This is a hot lead from the web site. Mark Smith is looking for a 2008 Acura. Press 1 now to connect to Mark."



Form to Phone Provider



Form to Phone Benefits

- Improved response time
 - Average email response time still over 4 hours
 - Reduced to 1 minute
- Captures prospect when still interested
- Tracks sales rate of response
- Minimizes loss to competitors by “list” shoppers

Telephone Technologies to Watch

- Text-to-speech conversion offers searchable recordings
- Key word identification
 - Automatic notification of certain words or phrases for fast response
- Tone analysis tracking
 - Identify angry or happy callers
 - Assist with quality support initiatives

Action Items


Crawl

Walk


Run




Action Items - Crawl

- 
- Review ad tracking service
 - Talk to CRM vendor
 - Nudge lead providers
 - Make providers talk to each other
 - Alter contracts for broadcast
 - Run demographics + outlying call reports

Action Items - Walk

- 
- Script prospect life cycle touch points
 - Start basic outbound tracking
 - Create best practice for messaging
 - Launch a single broadcast campaign
 - Add click-to-call to web site + email

Action Items - Run

- 
- Enable screen pop in CRM
 - Create broadcast touch points
 - Structure compensation to performance metrics
 - Automate broadcast touch points
 - Initiate employee self review

Ad Tracking Grows Up

*"It is not the employer who pays the wages.
Employers only handle the money.
It is the customer who pays the wages."*

Henry Ford

Questions?

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