



white paper:

The Digital Marketing Agency's Guide to Call Tracking



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Executive Summary

This guide will take you into the trenches to show you the nuts and bolts of call tracking implementation, and how digital agencies are making money by adding call tracking to their service offering and lowering attrition by providing ROI analytics.



Why Agencies Need Call Tracking

Hundreds—maybe thousands—of agencies across North America use call tracking. These agencies specialize in everything from conversion optimization and SEO to PPC and traditional ad campaigns.

Agencies are the #1 consumer of Convirza call tracking. Why?

Because call tracking is a perfect fit for agencies.

Call Tracking for Agencies

Agencies love reselling call tracking. It provides an additional stream of revenue AND valuable analytics data. Reselling from Convirza also comes with a free co-branded call analytics dashboard. That means that your clients can log in to Convirza from your site and see your color and your logo.

Here are a few reasons, in brief, that you as an agency can benefit from call tracking, and why many of our agency clients choose to bundle call tracking into their services and resell this analytics tool :

1) Accountability and Attribution – You can attribute calls generated by your actions, whether they be organic or PPC related. Your clients can hold you accountable for your output...but only with the data you provide them. You're providing a tool that allows them to hold you accountable and then you're only (if you want) providing them with data that makes you look awesome.

Genius.

2) Visibility - Your clients need visibility into your efforts. Call tracking does this.

3) Impressive - When your clients log in to a call tracking dashboard from your site that has your logo and your color scheme, they'll be impressed.

4) Testing - Are you testing which PPC copy produces more calls? You should be. Are you testing which keyword groupings produce more calls? You should be. Are you tracking which organic keywords produce the most calls? Or even how many calls SEO is producing, period? You should be.



5) Revenue – We sell call tracking to you for \$5.99/number/month (with all features and minutes included) and you sell it to your clients for \$8/number/month. Or just roll it into your offerings. Either way, you make money.

6) Reduced Attrition – Agencies that resell call tracking have lower attrition than those that don't. Call tracking makes you sticky.

7) Sales – Imagine being able to write a proposal that includes call tracking data for your prospect's industry. For example, you could tell the prospect how many calls someone in his industry can expect with certain packages you offer. It impresses them. It will win you clients.

This guide will take you into the trenches to show you the nuts and bolts of call tracking implementation, and how digital agencies are making money by adding call tracking to their service offering and lowering attrition by providing ROI analytics.

Basics of Call Tracking

Call tracking allows marketers to determine which ads, campaigns, and keywords generate high quality phone calls and which don't.

In other words, you and your clients can determine which specific PPC groups and even ads are producing calls. You can determine which organic keywords are generating calls. You can determine which sources are generating calls. This is like Google Analytics for the phone.

Hundreds of thousands of marketers across the U.S. and Canada use call tracking to close the loop on their marketing ROI calculations. Some of the biggest companies in the world use call tracking to measure the effectiveness of their PPC campaigns, SEO efforts, and retargeting. These companies value call data significantly. They spend a lot of money on it.

Marketing agencies use call tracking as a way to prove their worth to their clients. According to BIA/Kelsey, call tracking is, right now, a \$1B industry.



The Integrations

Convirza can integrate with any 3rd-party SaaS platform, such as this simple conversion path in Google Analytics:

If you want call data pushed into your clients' CRM, Convirza can do that. If you want call data pushed into an analytics dashboard, Convirza can do that. If you want call data pushed into your clients' Google Analytics account, Convirza can do that.

Agencies: The Argument for Analytics

Convirza is a call tracking platform with features designed specifically for agencies to use for their own internal analytics, AND to provide to their clients. Hundreds of agencies use it. So if you're an agency (SEO, PPC, social media, traditional, etc.), why should you use call tracking?

Clients DEMAND Visibility and Accountability

No longer is it enough for agencies to market and hope...hope their ads generate calls, hope they generate web traffic, hope they generate new business for their clients. Clients now DEMAND actual data about whether campaigns are working.

Major marketing companies are now saying that their clients aren't interested in impressions anymore. They don't care how many people see something. Rather, they care about how many people DO something.

They want analytics. They want to be able to track results. They want visibility and accountability. Agencies need to provide these analytics.

The Choice: Agency A vs. Agency B

The old-school agency view was that the agency did the marketing and the clients measured it. Again, that is old-school, and it is false. Put yourself in your clients' shoes. You're looking for a marketing firm to do SEO and PPC for you, and the choice comes down to two companies.

Company A does a great job. They do website design, SEO, PPC, social media, even some content marketing. They're awesome. But they don't offer any level of analytics.



“Convirza facilitates scalability...I would loudly recommend Convirza to other agencies. It is the simplest and best call tracking solution on the market.”

Ed Burckhardt, eCommNow

Company B also does a great job. They do website design, SEO, PPC, social media, even some content marketing. They're awesome. And they also provide call tracking data to their clients via a secure log in and scheduled reports. Call tracking allows the client to hold them the agency accountable, and gives the agency a system to quantify what they are doing for the client.

Who would a typical client choose? The agency that does marketing but provides no data, or the company that does marketing and provides data?

A/B Testing With Call Tracking

Call tracking also allows agencies to A/B and multivariate test their efforts. You can track which PPC campaigns, keywords, referring sites, directories, tactics, etc. are producing calls and which are not. Additionally, you can track which of those channels are producing good calls vs. bad calls.

And keep in mind that your clients will be able to log in to a Co-branded, fully automated, award-winning analytics solution, when you provide Convirza. They'll see your logo, your color-scheme and your data. We throw in the dev work for qualifying resellers.

Attrition and Call Tracking

Ultimately, you want your clients to remain your clients. You don't want the high attrition rates of many agencies. Agencies that use call tracking are able to show their clients how many calls they're producing for them. They're able to schedule reports to be sent to their clients. They're even able to automate text messages to send to their clients alerting them when milestones have been reached.

Call tracking allows agencies to retain clients and get new clients.

Call tracking metrics are all that stand between your client and finding another agency. If you can show them data that PROVES you're doing a good job, they won't leave.

And, if you can tell a prospect that you can push them an average of x amount of phone calls a week in their industry, you're more likely to get that prospect to become a client.



The bottom line is this: data that measures results produces results. Your clients want data so they can ensure you're generating results.

DNI and Agencies

The best way for digital agencies to use call tracking is with Dynamic Number Insertion.

Dynamic Number Insertion, or DNI, actually displays a unique phone number on your clients' website/landing page based on the source or keyword. In other words, it allows you to track how many calls each method generates with precision.

With DNI, call tracking numbers are swapped out via a small piece of JavaScript that is inserted on the landing page or website. A unique number is generated and Convirza tracks which calls came from which referring source, URL, or keyword.

A DNI Example

Below is an example of exactly how it works on our actual site, Convirza.com. If someone visits Convirza.com after an organic Google search they see (855) 889-3939. However, if they visit from a specific banner ad they see (866) 468-0900. These numbers both ring to our sales team. Nothing changes. However, Convirza is now able to track which source produced the call, and even the keyword that produced it.

Agencies often set up several DNI call tracking numbers for their clients.

Which Agency Types Need Call Tracking

This list obviously isn't all-inclusive. But, if you work for one of these types of agencies, it is at least worth getting a demo of Convirza to determine if you can be a certified reseller of Convirza.

Local SEO Firms

SEM and SEO agencies that work predominantly with small and local businesses are the perfect fit for Convirza. Why?



Clients, increasingly, don't care about impressions, branding, or top-of-mind awareness. They care about calls, clicks and sales—and revenue.

Because local businesses utterly and completely depend on phone calls to survive. Phone calls are the best leads they receive. This is according to local businesses themselves. BIA/Kelsey reports that 64% of local businesses say phone calls are their most valuable leads they receive.

Shouldn't then their agencies try to give them call data? Wouldn't the number and quality of calls an agency could produce be an important metric for that agency to provide?

As an agency, imagine your clients logging in to a call tracking portal from your site. In this portal—with your branding, by the way—they're able to track how many phone calls you're producing for them, the campaigns, keywords and ads that generated those calls.

Become a call tracking reseller and you can have all this.

Research shows that local SEO firms who provide call tracking to their clients have less attrition. There are no more excuses.

Note: If you're worried about call tracking and SEO, read this 30 page treatise on the subject.

Imagine being able to marry every single keyword, every visitor, and every lead to a phone call. You'll get credit, not just for the traffic you're sending your client, but the calls you're driving them as well.

That's powerful stuff.

B2B Agencies

This one might be surprising, but B2B agencies are a great fit for call tracking. Why? Well, because B2B companies are a great fit for call tracking.

We're a B2B company, after all, and our data shows that calls are significantly more valuable than form fills, White Paper downloads, online demo requests or even webinar leads. That's not to say that our other marketing channels did not contribute to inbound phone calls; but at the end of the day, the inbound phone calls convert to clients at 22% compared to 2% from other sources.



In a recent webinar we hosted with marketing guru Tim Ash, two interesting B2B data points were discussed:

- Inbound calls convert to accounts 10 times more frequently than form fills. This is true both of organic and paid leads.
- BIA/Kelsey data indicates that calls are 3 times more valuable than web leads across all B2B channels.

In other words, calls are very valuable. At Convirza, for example, only about 5% of our total leads are inbound calls, however, 15% of our accounts are inbound calls.

B2B callers are lower in the funnel than web leads. If you're an agency that caters to B2B clients, you need to provide them call tracking.

Call tracking data can be pushed into your clients' CRMs, their analytics dashboards, and their marketing automation solutions.

PPC Agencies

Every keyword grouping, every bit of ad copy, every landing page, needs to be tested and optimized. Part of this testing and optimization process is with call tracking.

Call tracking allows you to determine precisely which ads, which copy, which designs, and which keyword groups generate calls.

You can test with as much granularity as you like. Honestly, PPC firms are perhaps the best fit for call tracking there is. Set up is easy.

Call tracking and PPC are a perfect marriage.

Adwords Call Tracking for Agencies

In the preceding chapter we talked about the various types of agencies that could use call tracking. In this chapter we're focusing specifically on PPC agencies.

The other day I was on the phone with the Director of SEM at a large local marketing agency. This man was a true PPC and Adwords expert. He has more knowledge about optimizing campaigns, copy, and bidding in one finger than I do in my entire brain.



As we were talking about call tracking for PPC ads, a lightbulb went off in his head. He suddenly realized that the best way to get his clients to use call tracking would simply be to include call tracking numbers in his various Adwords packages. Literally include 5 call tracking numbers (or something) into each Adwords package he sells his clients.

As I said, he's a genius. Here are 5 reasons agencies should include call tracking as part of their Adwords efforts:

1) More data for you - Imagine being able to track precisely how many phone calls your PPC ads are generating. You'll be able to optimize so quickly it will make your head spin. You can track how many calls specific keywords generate, how many calls keyword groups generate, and even how many calls your entire PPC efforts generate.

You'll be able to compare call volumes across industries. You'll have some clients that will see a huge number of phone calls from PPC campaigns and other clients that will only see one or two.

Call tracking allows Adwords marketers to track exactly how effective your efforts are. Call tracking for PPC is a must.

2) More data for your clients - Your clients can hold you accountable. They can track how many phone calls your PPC efforts are generating. You can send them automated reports, text messages, or just give them access to their own Convirza account.

They will be incredibly impressed when you allow them to track the results of your efforts. You want them to hold you accountable. Trust me on this, they'll like that.

3) 'Asking' clients to use call tracking generally doesn't work - We work with some agencies that don't want to include call tracking in their product offerings. They typically want to refer individual clients to Convirza "when they need call tracking." That might sound good on the surface, but it rarely works.



Generally most agencies don't end up referring clients to us. They aren't used to selling call tracking. They're leery about referring clients to another salesman to talk to. And, generally, their clients don't take their advice. After about 6 months of this you realize that none of your clients are using call tracking.

The better way is for agencies to simply roll call tracking numbers into their various PPC models. Give away a certain number of call tracking numbers and Convirza logins in your packages. Build this into your pricing structure so you make money, and boom!

4) PPC and call tracking are a perfect match - Call tracking allows PPC marketers to match up—with tailored granularity—ads to phone calls. This can be done with Dynamic Number Insertion.

There can be a 1 to 1 ratio if you want. You can gather every single keyword if you want. Or, you could assign a phone number just to a keyword group. PPC and call tracking are an utterly perfect match.

5) It makes you look awesome - Imagine being able to give clients access to a co-branded and skinned call tracking and call analytics solution like Convirza. Imagine your logo, your color-scheme and your branding on the call tracking dashboard your clients are logging into. Imagine sending them automated reports, text messages and data...all of it showing how incredible you are at driving them calls.

Your clients will be so impressed that you are giving them a tool so they can hold you accountable. You're giving your clients the power to track how many calls your PPC efforts are driving them. This is powerful stuff. It will allow you to retain clients and attract new clients.

“But, My Clients Don't Care”

Recently I was on a call with the CEO of an agency. This agency is fairly large and caters to large number of SMBs in the Northwest. The agency started promoting Convirza to its client-base a few months ago. But it has never really taken off. Very few of their clients are using Convirza.



There were 2 things that startled me from the call.

1) The agency said that their clients “aren’t that interested in call tracking data.”

This is surprising, startling, and incorrect.

First of all, we know that SMBs of specific types are EXTREMELY interested in call tracking data. They are obsessed with it. BIA/Kelsey says that local businesses value calls higher than any other lead source. Calls are king in the local marketing world.

Second, I'm not sure how this agency was gauging call tracking interest among their client base, but I can assure you that 99% of businesses will not just randomly ask for call tracking. They may not even be interested when you mention it to them initially. However, if it is provided to them (and either rolled into costs, or added as a very small line item) and the data starts rolling in, they will start to LOVE the data.

In the vast majority of the agency relationships we have at Convirza, when the agency simply starts including a call tracking number with whatever package the customer buys, the customer IMMEDIATELY starts to value the data.

2) They were concerned about confusing clients with different phone numbers.

This is just dumb.

The concern is literally that clients will be confused if they see one phone number on a direct mail piece and another number on a business website, those concerns are unfounded. No remembers any phone number ever.

I honestly know two numbers by memory: my parents phone number and my wife's phone number. If you think that someone remembers your business phone number my memory, you are wrong 98% of the time.



Why Convirza is the Choice

Some call tracking solutions are designed for SMBs. Some are designed for enterprise-level clients. Some are designed so poorly that you can't tell who they're designed for. Some look like they were built in Siberia in the late 1980s.

Convirza is awesome and it has features specifically designed for agencies. Certainly Convirza has hundreds of SMB clients, massive companies on the Fortune 100 list, and everything in between. We have manufacturing clients, hospitality clients, automotive clients, financial clients, professional services clients, etc.

We love them all.

But, ultimately, we designed most elements of our system so agencies could scale it. Here are the reasons agencies should use Convirza as a solution to deliver call tracking metrics to their clients:

Flat Pricing - Our retail pricing models charge a subscription price, plus charges for minutes and numbers. The retail pricing model is very competitive. But the wholesale pricing is just silly.

Our wholesale pricing models are the best in the business. Period.

Reselling Agencies get FREE co-branding from Convirza. You receive an exclusive dashboard with your color scheme, your logo, and your branding.

The wholesale pricing is flat. Meaning there is a fixed cost per number that INCLUDES everything else. That way you know exactly how much you're paying us, so you can charge your clients slightly more and make a little cash.

Our wholesale pricing is so obscenely low that the boss wouldn't even let us publish it!

FREE Co-branding - When you're a qualified reseller, we'll skin the dashboard and entire analytics portal for free. That means your logo and your color scheme appear on a secure call tracking portal for your clients only. When they log in, it will truly be your analytics portal. .



“Elegant” UI/UX - Here are words and phrases our clients have used to describe Convirza user interface and design:

“It is simply elegant.”

“Beautiful.”

“Compared to other call tracking tools...well, there is no comparison.”

“This is like using a brand new Mac, after I'd been using a 1992 PC.”

“It changes the call tracking experience.”

“This is what call tracking has been missing for 20 years.”

When your clients receive reports from Convirza and when they log in to your co-branded analytics portal, they will be impressed. You won't have to be ashamed of your analytics portal. It is functional, beautiful and awesome.

This has been confirmed by awards from Amazon Web Services and others.

Various Methods of DNI - We don't force you into expensive session-based dynamic number insertion pricing. We offer 3 types of dynamic number insertion for online call tracking.

This allows you flexibility to manage costs AND get the data you'll actually use.

Organizational Structure - The hierarchy of data within the tool is designed for agencies. Your clients will only be able to see their data, not each other's. You will be able to see all the data you want. Because our tool was designed to give specific groups permission to view specific things, it is a perfect fit for agencies.

Robust and Customizable Reporting - Do you want your clients to get text messages when you've hit certain call volume or call quality goals? Do you want them to receive a series of call tracking reports in their inbox every Monday morning? Or, would you like them to be able to log in to the dashboard themselves and view the data?



How to Bill Clients for Call Tracking

As mentioned above, call tracking allows agencies to track how many quality phone calls they produce for their clients. Agency clients are able to log in to a co-branded dashboard (with agency color and logo) and see their call tracking data. The most successful agency resellers include call tracking numbers in their packages.

But, we still get the question from agencies: what's the best way to implement and bill for call tracking?

Here are 5 possible options for billing clients for call tracking. Starting with the least likely to succeed:

1) The Sell

Overview: Some agencies try this. Basically, they don't want to modify any of their billing processes, so they will only sell call tracking only to clients that say they need it. That means Convirza actually bills the client, not the agency. This appeals to agencies because it seems easy. However, this is the least effective way for an agency to get involved with Convirza.

Pros

- This works for big agencies with big clients. For example, if you're an agency with clients paying you more than \$100K each month, this is the best option.
- You don't have to manage any element of the process. Basically your clients are our clients. You're not even technically a reseller.

Cons

- It generally doesn't work. Most agencies aren't used to selling call tracking...so most don't. And those that do try to sell it don't do it very well.
- After a few months of trying to sell call tracking to clients individually without much success, most agencies eventually just give up.
- It is just another thing to sell. Sales teams get burnt out.
- No co-branded portal for your clients to log in to.



2) The Voluntary Line Item

Overview: Instead of selling to clients that ask for call tracking, agencies include call tracking as a heavily encouraged, but voluntary line item. In other words, during the sales process the agency just assumes that the client wants/needs call tracking. The client has to specifically ask for call tracking to be removed from their account. This is becoming more popular and it works.

Pros

- Your sales team doesn't need to sell call tracking to each client. Instead, they just mention it will be an added line item.
- It is scalable and will get more of your clients using call tracking.

Cons

- Your sales team does have to be able to explain the features/benefits of call tracking when they get client pushback.
- They have to be comfortable with some client pushback.

3) The Mandatory Line Item

Overview: MANY agencies use this option. Basically it works like this: an agency just includes call tracking with every package they sell. For example, when someone signs up for a \$500/month SEO package, they get 2 call tracking numbers. You bill the client \$10/number (or whatever), and this charge appears on their bill as a separate line item.

Pros

- Your client doesn't even have an option to not use call tracking. You are their agency and you use it and include it as a value-add. Done.
- You don't have to sell call tracking to your clients, or even defend it. Call tracking is simply part of what you do...a mandatory benefit your clients receive.

Cons

- If you don't frame call tracking as a massive benefit and a way for your clients to hold you accountable, you might have some clients wondering what the heck this extra line item is.



4) The Bundle

Overview: This option works basically like the mandatory line item except that it isn't a billing line item. You include call tracking with every package you sell, but instead of listing as a separate line item on an invoice, you simply roll it into your pricing. Maybe this means that your baseline prices increase by \$20/month or something. You decide.

Pros

- Call tracking is just part of doing business with you. We work with LOTS of agencies that treat call tracking this way. They just include it. Their clients are given a phone number and told what their log in will be.
- You don't have to explain to clients what the extra line item for 'call tracking' is. Heck, tell them they're getting it for free.
- Free Co-branded Application

Cons

- Overcoming slight price increases for your services.

5) The Include and Absorb

Overview: Call tracking is included in everything, but instead of passing along a cost to your client, you just absorb the cost because you recognize the value of call tracking.

We actually work with a surprising number of agencies that do this. [Here's a case study example of an agency that works this way.](#)

Pros

- All your clients get call tracking for free.
- Call tracking is cheap.

Cons

- None. It's all roses.

5 Things to Know About Being a Reseller

Our reseller program is the best thing ever. Agencies love it. Here are a few things you need to know about it.



1) We have a reseller program - We don't advertise it on our site much, but Convirza has a very successful and very simple reseller program designed specifically for agencies.

This reseller program allows agencies to include call tracking as part of their offerings. For example, we have direct mail firms as resellers. They include a tracking number with every mailing they produce. They also provide log-in information to their clients so their clients can track calls and hear call recordings as well. The same model works for PPC firms and SEO firms as well.

2) The cost is flat and VERY scalable. It is also very inexpensive - That means you, as an agency, know precisely what you pay Convirza on a monthly basis. It is flat and predictable.

3) It can be an extra revenue stream for you - You can include this as an extra line item on their monthly invoice or just roll it into your pricing. Heck, raise all your prices by 10 bucks and just include it.

Some of our partners make a GREAT deal of money from just being a call tracking reseller.

4) The best way to implement call tracking is to include it with your marketing offerings - Some of our resellers try to sell call tracking to clients as they close accounts...or, even worse, they just sell it to clients who mention call tracking to them.

Neither of these scenarios work.

The only model that works is to simply include a call tracking number with every package an agency offers. Or, find a volume that works for you: just include a number for big packages.

5) We will build you a co-branded call tracking dashboard - This means that when your clients log in to see their call tracking data they will see your logo and color scheme. You look awesome. Your clients know you're legit and credible.



Call Tracking Agency Reseller Q&A

Why should I become a Convirza Certified Reseller?

Becoming a reseller gives your clients access to the foremost marketing analytics and call tracking tool on the market. Reselling Convirza adds significant value to your offerings, and adds a new revenue stream.

How does the reseller program work?

Becoming a reseller gives you access to exclusive flat-rate reseller pricing. With these simple pricing models you can 1) provide Convirza to your clients for free or, 2) resell Convirza to your clients at a mark-up, increasing your revenue, and providing your clients with significant added value.

What additional benefits do resellers receive?

1. A co-branded call tracking dashboard. In other words, your clients see your logo, color scheme and branding when they log in.
2. Marketing collateral including videos, sales sheets, and emails to help you integrate Convirza into your offerings.
3. Additional promotion via case studies, presentations and co-branded White Papers

How should I implement Convirza?

The best way to implement Convirza reseller pricing is to integrate Convirza into your offerings and pricing, rather than trying to sell Convirza to your clients individually. Our experience is that the most effective resellers roll Convirza into their offerings. (Example: an SEM firm includes two Convirza phone numbers as part of their service offerings.)

Are there opportunities to White Label Convirza?

Yes, we will co-brand the Convirza platform for resellers. And we will do this for FREE for qualified resellers.

Additional Resources

White Paper: The Authoritative Guide to Call Tracking and Local SEO

<http://info.Convirza.com/call-tracking-local-seo-authoritative-guide>

White Paper: 5 Ways to Prove Marketing ROI With Call Tracking

<http://info.Convirza.com/5-ways-marketing-roi>



About Convirza

Convirza is the next generation of intelligent call tracking and marketing automation. Convirza allows marketers to track marketing ROI, close rates, lead quality, and call quality. Offering award-winning features like Dynamic Number Insertion (DNI), full-scale Google Analytics integration, and Conversation Analytics, Convirza is the most robust call tracking solution on the market.

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