Call Tracking Metrics- ROI Reporting
Detailed Definitions

We know that it's critical for you to be able to demonstrate the return on each of your advertising investments- and that it has traditionally been hard to produce this data. Call Tracking Metrics ROI reports enable you to track your advertising costs, sales revenue and customer service rep performance along with your inbound call performance, providing you with rich information on the results of your efforts.

ROI Dashboard:

This report computes various ROI and call metrics so that you can get a complete view of the performance of each of your campaigns.

- Call Source= The tracking source name for each of your tracking numbers.
  - This name is managed at the tracking number level for each of your tracking sources. You can change the name of a source by clicking edit next to a tracking number using that source on the manage tracking numbers page and changing the tracking source name there.
  - If you have multiple tracking numbers with the same source, the source will only show up once in this list in the ROI dashboard.
  - You can exclude a source from showing in your ROI dashboard on the ROI settings page.

- Monthly Advertising Spend ($)- Dollar amount entered by you each month. This should be the amount you are spending for the given month on that particular campaign (source).
  - You can set defaults for each source on the ROI settings page so that the spend will pre-populate with those budgets each month. You can override the defaults by typing in a new spend for a source for a given month.

- Calls= total # of calls attributed to that source for the chosen month.

- Unique Callers= total # of callers attributed to that source for the chosen month (if 1 person calls 3 times, they will only show up as 1 unique caller).

- Cost/Call= Monthly advertising spend for that source for the time period ÷ # of calls attributed to that source within the time period

- Cost/Caller= Monthly advertising spend for that source for the time period ÷ # of callers attributed to that source within the time period

- Calls Closed= The total # of calls generated from that source with closed sales.

  - Calls are marked as closed sales in the call log. This is done by clicking the sale icon in the far right column for a particular call and checking the box after "Did this call close the sale?"
  - When you check the box, be sure and enter a sales amount and a sales date so that the sale reflects correctly in the reporting.

- % of Calls Closed= # of calls with closed sales from that source ÷ total calls from that source

- Callers Closed= See explanation for "calls closed" above. Only difference is that if the same caller called several times and had several sales from those calls, the sale would only count once in this column.

- % of Callers Closed= total # of callers from that source with sales closed ÷ total # of unique callers from that source

- Total Sales Revenue ($)= the total sales revenue (in $) for a chosen time period generated from phone calls attributed to that source.
  - Revenue is entered at the call level in the call log. This is done by clicking the sale icon in the far right column for a particular call and checking the box after "Did this call close the sale?" When you check the box, be sure and enter a sales amount and a sales date so that the sale revenue reflects correctly in the reporting.

- ROI(%)= This a performance measure used to evaluate the efficiency of an investment or to compare the efficiency of a number of different investments. In this case, it is used to compare your advertising investments. To calculate ROI for each source, the benefit (revenue) attributed to calls from a source is divided by the cost of the source; and the result is expressed as a percentage or a ratio.

$$\text{ROI} = \frac{\text{(revenue from calls from that source for time period- the advertising spend for that source for time period)}}{\text{Advertising spend for that source for time period}}$$

Customer Service Representative (CSR) Metrics

This report computes various performance metrics for each of your CSR's so that you can gain an understanding of how they are performing on phone calls.

- Name (First Name and Last Name)= the name of the CSR. CSR names are entered at the call level in the call log by clicking on the sale icon for a call. Within that window, you can choose to associate a call to a CSR already in the system or type in a new CSR. All CSR's in the system for your account will show up in the name column (regardless of if they have had recent sales or calls attributed to them).

- Calls Answered= The # of calls attributed to that CSR for the time period. (see explanation above under "Name" for how to attribute a call to a particular CSR)

- Calls Closed= the # of calls attributed to a particular CSR that have sales closed within the time period. Sales are closed at the call level by clicking on the "sale" icon in the call log and checking the box after "Did this call close the sale?" When you check the box, be sure and enter a sales amount and a sales date so that the sale revenue reflects correctly in the reporting.
  - Sales will show up in the time period that the sales closed, not when the call occurred.

- Percent Calls Closed (%)= total # of calls associated to that CSR with sales marked as closed in the time period ÷ total # of calls associated to that CSR during the time period.

- Percent Callers Closed (%) = Total # of unique callers associated to that CSR marked as closed in the time period ÷ total # of unique callers associated to that CSR during the time period.

- Average Rating (1 to 5) = The total stars a CSR has accumulated from calls associated to them that have occurred in the time period ÷ total calls associated to that CSR in the time period
  - A CSR earns stars at the call level. Click on the sale icon in the call log and choose to give the CSR 1 to 5 stars to reflect their handling of the call. 1 being the worst and 5 being the best.

- Revenue Closed ($) = The total amount of sales revenue that closed during the time period from calls attributed to a CSR.
  - Revenue is closed at the call level by clicking on the "sale" icon in the call log for a particular call. Check the box after "Did this call close the sale?" to indicate that a sale closed. When you check the box, be sure and enter a sales amount and a sales date so that the sale revenue reflects correctly in the reporting.
  - Sales revenue will show up in the time period according to the date marked for the sale—not when the call occurred.

Forecasting Tool

Imagine being able to forecast revenue coming from each of your advertising campaigns for the coming month? This tool factors in the historic performance of each of your campaigns and projects revenue based on advertising budgets you enter. Use this tool to figure out how much money you need to be spending on your advertising to hit your revenue targets. In addition, you can use it to set performance benchmarks for your team.

- Call Source= see explanation for "Call Source" in ROI dashboard section.

- Projected Advertising Spend= You will populate with how much you are expecting to spend in a future month for a particular advertising source (campaign). You can play around with this number to see different outcomes in the other columns.

- Historical Average ROI= Sum of ROI %'s for that source across months where you have populated advertising spend data for that source ÷ # of months where you have populated advertising spend data for that source

- Projected Revenue= projected cost for that source + net income for that source (see explanation below)

- Projected Net Income = projected cost for that source x historical average ROI for that source