



CALL TRACKING: A HIDDEN SOURCE OF VALUE FOR CUSTOMER INSIGHTS

Energy Circle Webinar Series
Peter Troast, Founder & CEO
May 19, 2021

Upcoming Webinars

~~May 5 - What Are Your Online Competitors Up To? Conducting An Assessment~~

~~May 12 - Live Video Critique Part 2: With Senior Media Producer Jake VP~~

May 19 - Call Tracking: A Hidden Source of Value for Customer Insights

May 26 - Marketing Heat Pumps: How To Handle Common Consumer Objections

June 2 - *Tentative*: Update on Hope for Homes Legislation

June 9 - Marketing Heat Pumps: How to Target the Anti-Fossil Fuel Audience

June 15 - How the New Apple iOS Privacy Update May Impact Marketing



7 Free and Easy Tools You Can Use to Evaluate Your Online Competition



By Emily Silverman | May 12, 2021

It's always good to know what your competition is up to, especially when it comes to their digital marketing efforts. By evaluating your contractor competitors online, you can glean valuable information about:

- What products and services they're focusing on
- Whether they're prioritizing specific geographic areas
- What keywords they're using
- What branding and messaging they're using
- What their pricing strategy may be

Note: Online Competition Isn't the Same as Real World Competition

Before we dive into exploring these tools, it's important to note that the businesses you define as your competition in the real world might not be the same as the ones you're going up against online.

It's not uncommon to have a few online competitors who you might not be getting quoted against for jobs, but are competition nonetheless. This could be a new competitor who you haven't heard much about but is gaining traction online.

This isn't to say that you should ignore your real-world competitors and put your focus entirely online, however. Online and real-world competitors are equally important—they just tend to be a little different.

The Best Free Tools for Evaluating Your Online Competition

We use a lot of different tools here at Energy Circle, and we've compiled a list of what we believe are the best,



This Common SEO Mistake Is Killing Your Rankings



By Emily Silverman | May 5, 2021

"I've been Googling my business a lot lately and it's not showing up in the search results. Are we doing something wrong?"



We hear this all the time at Energy Circle, and we get it—you've been putting money and effort into SEO and PPC for your HVAC, solar, or home performance business, and you want to know whether it's working. But Googling your own business isn't as harmless as it sounds. In fact, when you Google your business to check

What We'll Discuss

- 1 LEAD FLOW IN 2021: PHONE vs FORM vs CHAT**
- 2 CALL TRACKING EXPLAINED—THE HOW AND THE WHERE**
- 3 CALL TRACKING DATA AND THE INSIGHTS IT PROVIDES**





LEAD FLOW IN 2021

PHONE vs FORM vs CHAT

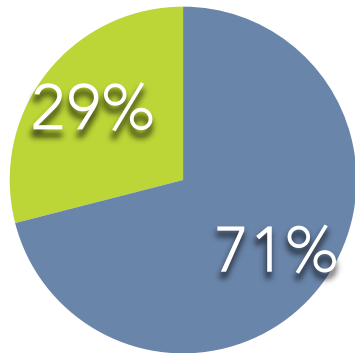
Evolving Contact Channels

- 1. Lead Form**
- 2. Phone Call**
- 3. Live Chat on Website**
4. Message from Google
5. Message from Facebook Messenger
6. Quote Request from Google
7. Bid Request from Aggregator
8. Text Message

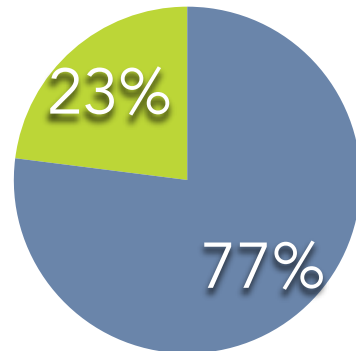


Growing Demand for Instant Gratification

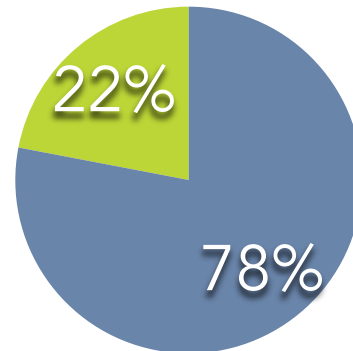
Web Forms vs Phone/Chat



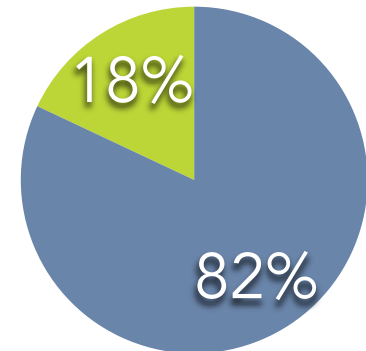
2017



2018



2019



2020

~135 Energy Circle Websites



How Did You Hear About Our Company?

“On the Internet”

“Heard an Ad”

“Saw a Truck”

“From a Friend”





CALL TRACKING EXPLAINED

Our Preferred Product

CallRail

\$40-\$100/month
(based on minutes)



Dynamic Number Swapping

The screenshot displays the SmartHouse Heating and Cooling website. The logo, featuring a house with glasses, is on the left. The navigation menu includes links for About Us, Service Area, Our Products, Financing, Rebates & Specials, Blog, Reviews, and Contact Us. A red oval highlights the contact information: "Call Us: 314-648-3162" and "Text Us: 314-310-2242". A red button labeled "Schedule an Appointment" is also visible. Below the navigation, a horizontal menu lists services: HEATING, COOLING, INSULATION, ENERGY EFFICIENCY, HEAT PUMPS, INDOOR AIR QUALITY, and MAINTENANCE. The main content area features a large image of a smiling man and woman with a beagle dog. A white text box on the left contains the headline "Been considering how healthy the air in your home is?" and the subtext "We've got customized indoor air quality solutions for every home." Below this is a red "LEARN MORE" button. A small navigation bar with five dots is at the bottom of the image.

SmartHouse
HEATING AND COOLING

About Us | Service Area | Our Products | Financing, Rebates & Specials | Blog | Reviews | Contact Us

Call Us: 314-648-3162 | Text Us: 314-310-2242

Schedule an Appointment

HEATING COOLING INSULATION ENERGY EFFICIENCY HEAT PUMPS INDOOR AIR QUALITY MAINTENANCE

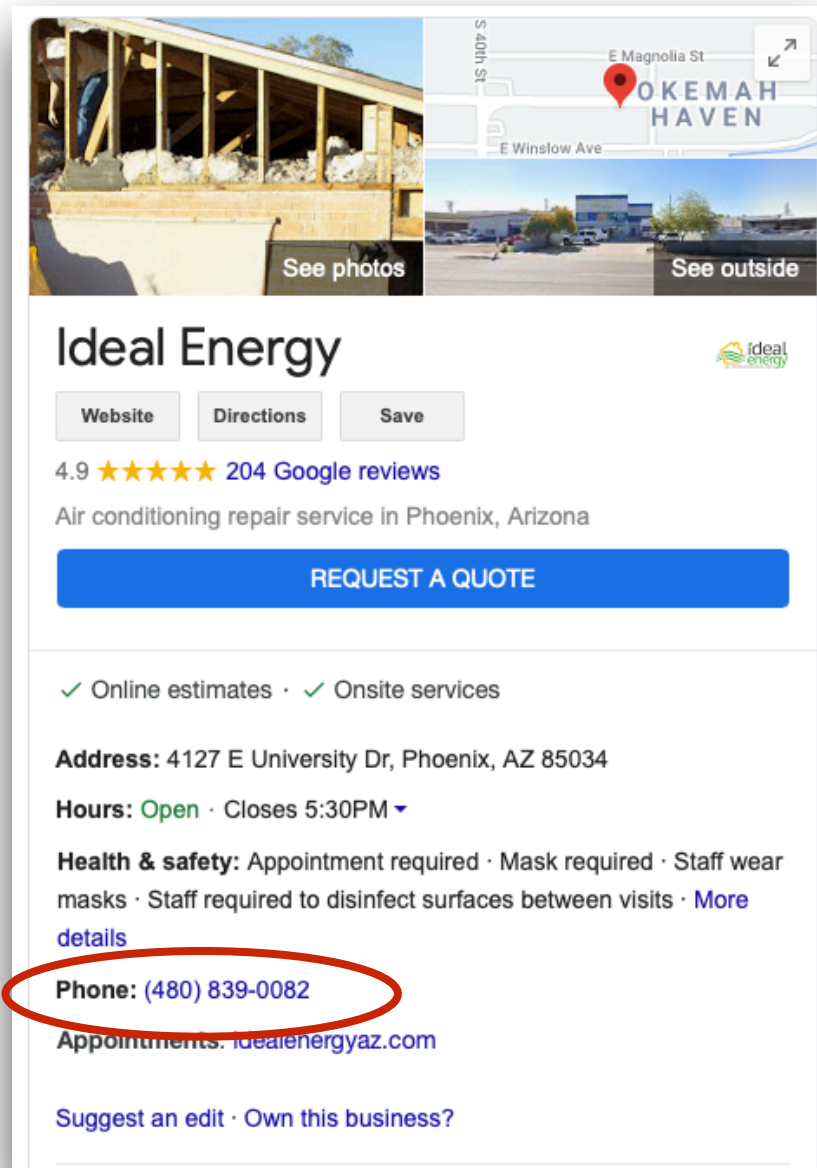
Been considering how healthy the air in your home is?

We've got customized indoor air quality solutions for every home.

LEARN MORE



Google My Business



Ideal Energy

Website Directions Save

4.9 ★★★★★ 204 Google reviews

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Phone: (480) 839-0082

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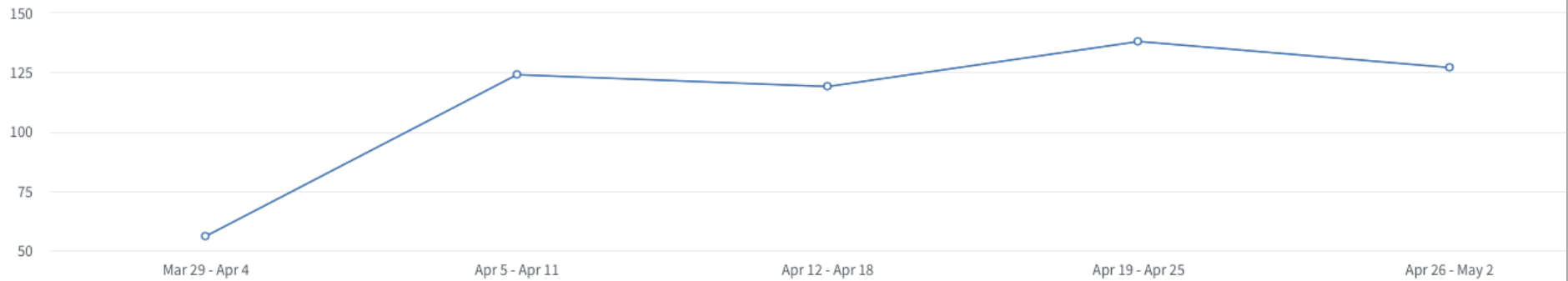
CALL TRACKING DATA & INSIGHTS

Lead Volume

Leads

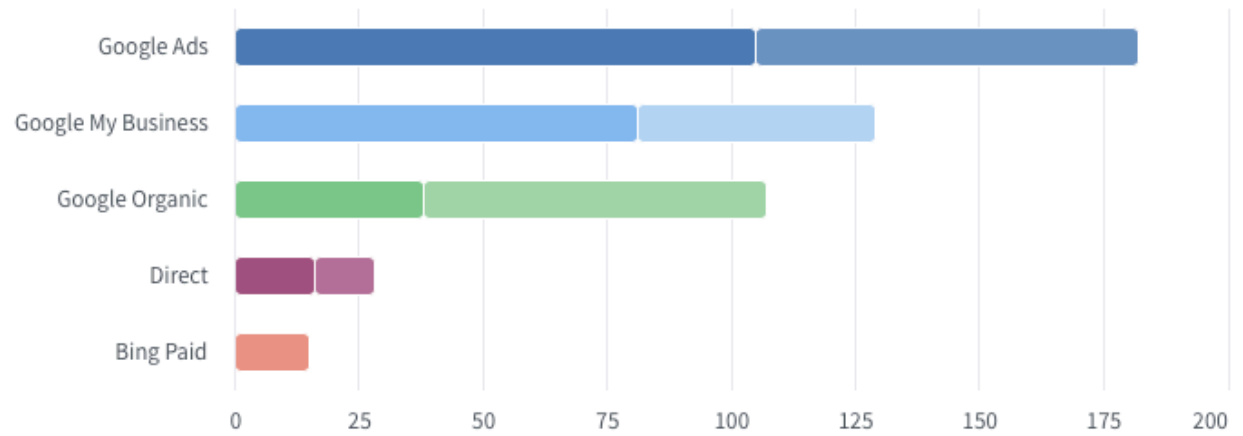
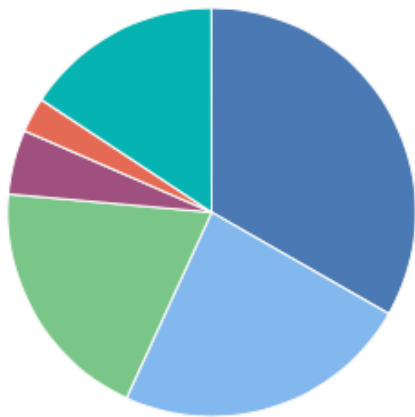
▼ during **Last Month** ▼ by **Weeks** ▼ and **+ Add Filter**

533 Leads from Apr 1, 2021 - Apr 30, 2021 Pacific Time



Call Attribution

Calls for Apr 1, 2021 - Apr 30, 2021 Pacific Time

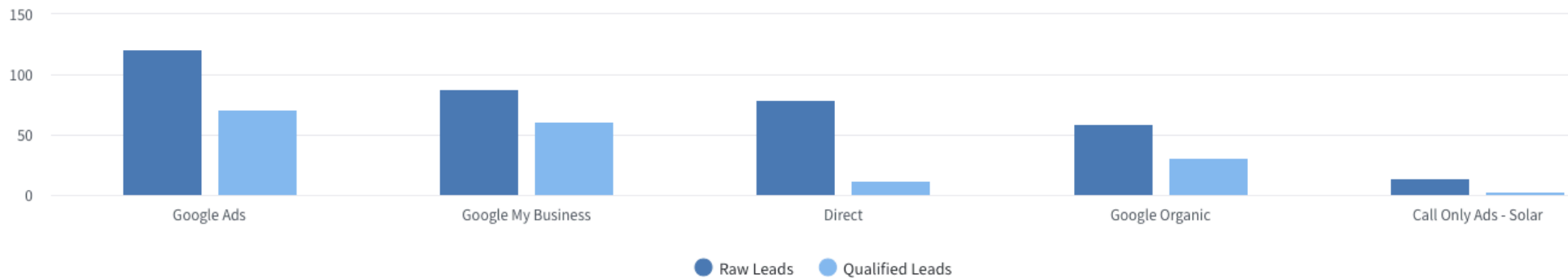


Attribution & Qualification

Lead Attribution by Source

▼ during Last Month ▼ for 50/50 Attribution ▼ and + Add Filter

Leads for Apr 1, 2021 - Apr 30, 2021 Pacific Time



Far More Accurate Than GMB Insights

GMB Insights



CallRail

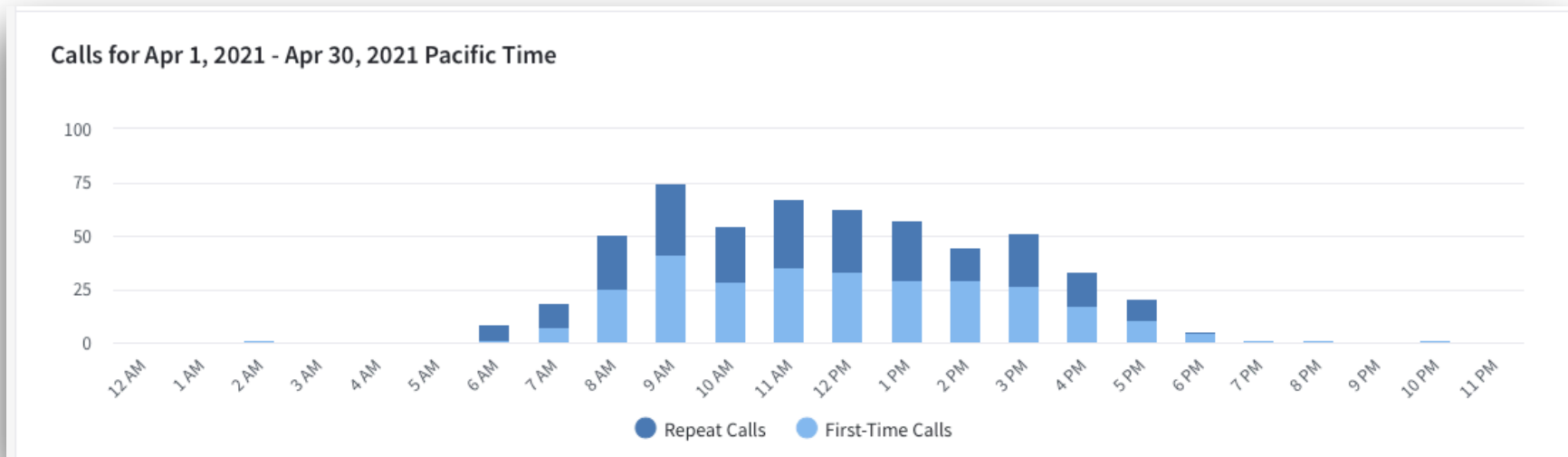
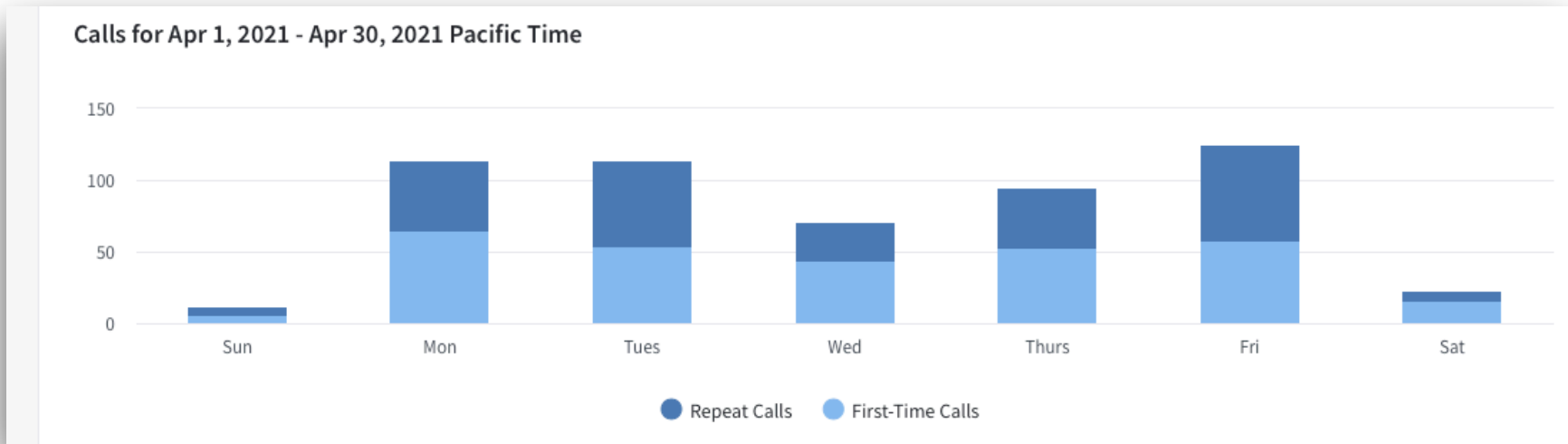


Full Tracking by Call

<p>Jim Weeks 866-756-0164 ●</p>	<p>Brower Mechanical</p> <p>👍</p>	<p>Apr 30 2:05pm</p>	<p>Total: 3 Calls: 3 Forms: 0 Texts: 0</p>	<p>Google Ads Apr 24 7:45pm Keywords: +mini+split +system Landing Page: www.browermechanical.com/service/mini-splits Referrer: www.google.com</p>
<p>Downtown Ford 916-442-6931</p>	<p>Brower Mechanical</p> <p>👍</p>	<p>Apr 30 2:02pm</p>	<p>Total: 2 Calls: 2 Forms: 0 Texts: 0</p>	<p>Google Organic Jul 31, 2018 11:17am Landing Page: www.browermechanical.com/contact-brower-mechanical Referrer: www.google.com</p>
<p>South Place, CA 916-276-4790</p>	<p>Brower Mechanical</p> <p>👍</p>	<p>Apr 30 1:40pm</p>	<p>Total: 2 Calls: 2 Forms: 0 Texts: 0</p>	<p>Google Organic Jun 30, 2018 9:09am Landing Page: www.browermechanical.com/ Referrer: www.google.com</p>
<p>Tulare, CA 559-467-1386 ●</p>	<p>Brower Mechanical</p>	<p>Apr 30 1:31pm</p>	<p>Total: 1 Calls: 1 Forms: 0 Texts: 0</p>	<p>Google My Business Apr 30 1:31pm Campaign: phone</p>
<p>Branges Barbara 916-812-4715 ●</p>	<p>Brower Mechanical</p> <p>👍</p>	<p>Apr 30 1:24pm</p>	<p>Total: 2 Calls: 2 Forms: 0 Texts: 0</p>	<p>Google My Business Apr 30 10:39am Campaign: phone</p>
<p>Mel Williams 917-723-1539 ● mhd7153@gmail.com</p>	<p>Brower Mechanical</p>	<p>Apr 30 12:35pm</p>	<p>Total: 1 Calls: 0 Forms: 1 Texts: 0</p>	<p>Direct Apr 30 12:30pm Landing Page: www.browermechanical.com/contact-brower-mechanical Referrer: direct</p>

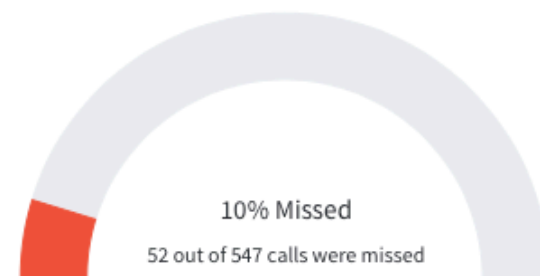
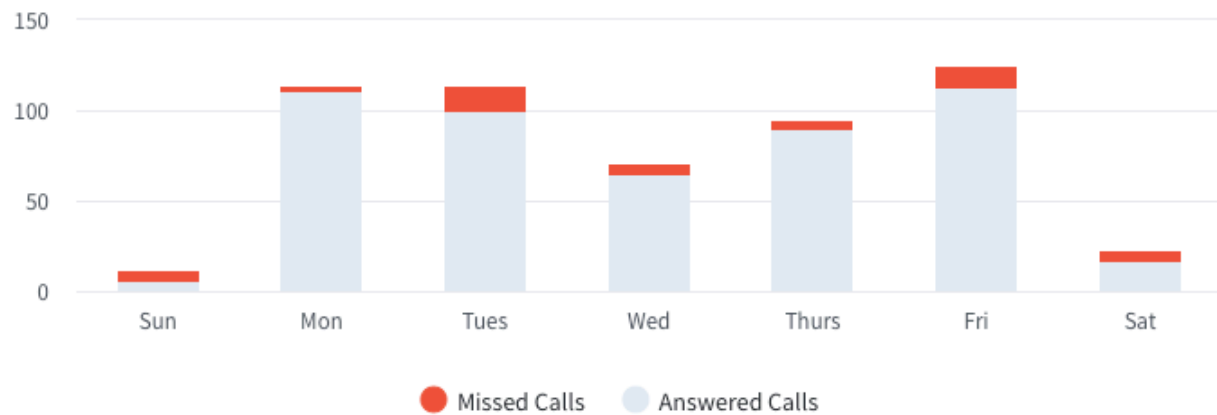


Calls by Day & Time



Missed Calls

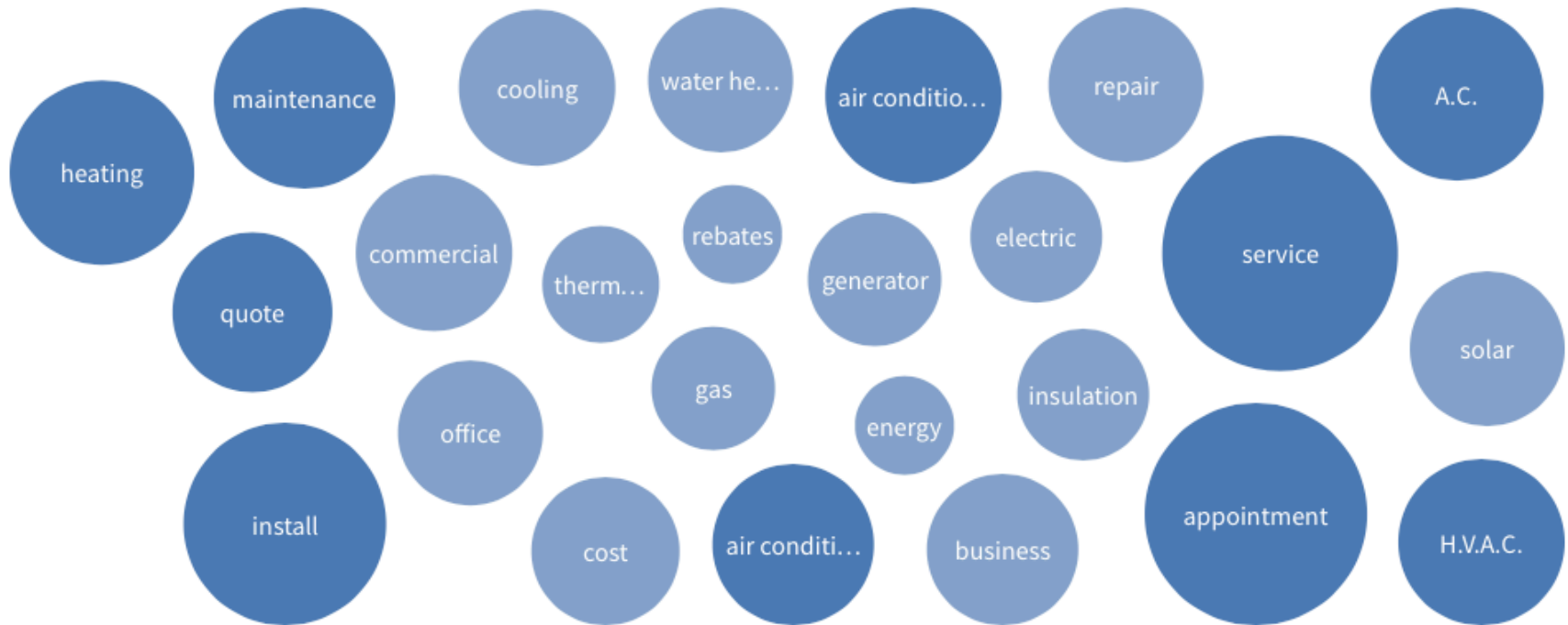
Missed Calls for Apr 1, 2021 - Apr 30, 2021 Pacific Time



Key Terms Spotted

during Last Month spoken by Any Speaker showing Total Calls by Total and + Add Filter

Total Calls for Apr 1, 2021 - Apr 30, 2021 Pacific Time



Key Term Spotted	Total Calls ▼	Qualified Calls	First-Time Callers	Average Duration
service	225	208	117	5m 19s
appointment	189	188	101	5m 38s
install	137	123	79	6m 11s
heating	100	93	70	6m 45s
maintenance	93	93	39	5m 57s
air conditioning	85	79	53	6m 20s
A.C.	80	77	41	6m 23s
H.V.A.C.	69	68	47	7m 18s
air conditioner	63	62	28	6m 17s
quote	60	58	32	7m 3s
commercial	57	51	36	5m 11s
cooling	57	57	37	7m 29s
repair	55	52	35	6m 11s
solar	55	48	36	6m 16s
business	51	47	37	6m 42s
cost	47	47	35	8m 32s

Call Recording—High Value

Total Calls: 3 First Call: Apr 30, 2021

Call Back View Timeline

Transcription Edit

It's a great day for our mechanical. This is Monica. How can I help you?

Hi, Monica. This is [redacted] Do you do **insulation installs** and addicts?

Yes, we do.

Okay. Yes. I'm wondering if I could talk to somebody about **installing** our 38 **insulation** in my attic.

Agent: 61% 00:30 / 06:09 Download MP3

Customer: 39%

Key Terms Spotted — Agent

"insulation"

Agent: 61% 00:51 / 06:09 Download MP3

Customer: 39%



Success in High Performance Contracting

First Touch is Critical

Most Leads are Single Measure
You are Selling Something Different
Experience Has to Be Better Right From Start





**THANK YOU!
QUESTIONS?**

peter@energycircle.com