



Welcome to Calldrip

A Step-by-Step Guide to Calldrip

Background

Calldrip is a global leader in Conversational Sales software, with an emphasis on lead response and process improvement. More importantly, we're deeply committed to helping our customers grow.

10K+

users around the world.

1M+

leads distributed annually.

<1 min.

average lead response time.

6M+

Connected calls per year.

25M+

Conversations

Intro

Calldrip isn't just automated lead follow-up - though that is very important - we also provide website chat and comprehensive text messaging to engage your leads, conversational analytics to pinpoint optimal marketing channels, coaching tools to take your team to the next level, and an automated customer review process that can build trust and improve your search rankings.

Calldrip enables your sales team to build stronger relationships with prospects, faster, improving efficiency in your whole sales process.

Here, you'll learn how to incorporate Calldrip into your sales to improve customer experience, and unlock sales potential.

The three essential pillars of Calldrip are:

- **Prioritize speed of response.** The best time to communicate with a prospect is at their peak moment of interest: when they engage with you.
- **Meet your prospects where they are, when they're ready.** By putting the prospect first, you build trust and add value before asking for the sale.
- **Embrace the human element.** Prospects don't buy from companies, they buy from people. After the sale, those relationships also contribute to customer loyalty, positive reviews, and referrals.



Calldrip's Conversational Sales Tools

Our software is designed to help you serve your prospects better, build trust quickly, and improve your sales team's performance.

Here's an overview of the Conversational Sales tools included in the Calldrip software, and how they work:

- **Respond** automatically generates a phone call from salespeople to prospects immediately after the prospect fills out a form.
- **Engage** is a text chat widget that converts qualified prospects to a phone call or SMS text chat - automatically. Engage ensures that you connect with your prospects via a conversation at their precise moment of interest.
- **Track** clearly identifies phone call sources and metrics, so you can see which channels and lead sources are converting the best. This is a good proxy metric to understand which Conversational Sales channel and lead sources are most valuable to your business..
- **Review** makes it easy for prospects and customers to leave quick, conversational reviews on the top review platforms, including Google.
- **Coach** is a sales coaching software that helps ensure every conversation is top-notch. It includes call recording reviews done by both real people and AI technology.

This entire suite of software solutions is purposefully designed to empower your team to have excellent conversations with prospects at every step of the sales journey.



How CallDrip Works

1. A CONSUMER SUBMITS AN INQUIRY

When a prospect fills out a form on your site, clicks on an ad, or calls into your business, CallDrip instantly acquires and records the inquiry details.

TIP: Implementing Engage on your website is a great lead generating tool. It allows you to instantly respond to shoppers via text and phone.

TIP: Set up Automated Receptionist so that every inbound call gets answered!

2. CALLDRIP SENDS AN AUTOMATED TEXT

CallDrip automatically sends an instant text to your new lead. This automated text message is configurable so you can customize the message to fit your business needs. Typically the message will introduce your business, thank them for their inquiry, and let them know that someone will be in touch. This text message can come from your primary business number. All subsequent phone communications will come from this same number to ensure clear communication with the prospect.



TIP: Be friendly, yet professional. Even though texting is a much less formal channel, you should still make sure you're representing your company well. Be sure you're using grammatically correct language, the message is concise and easy-to-understand.

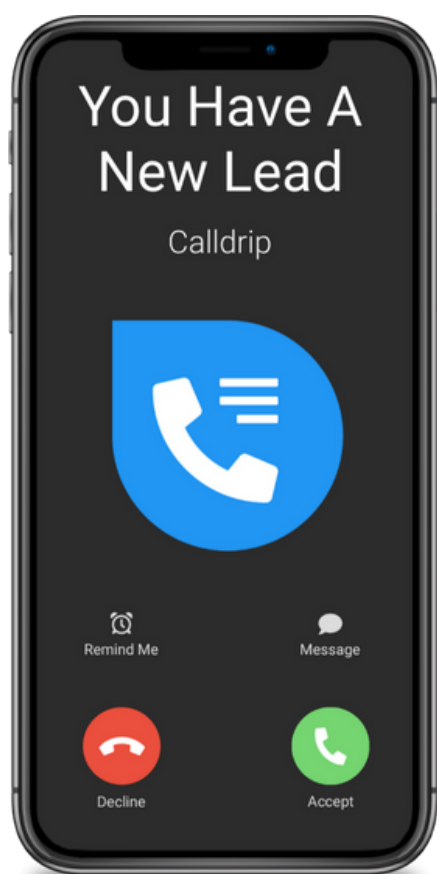
TIP: The phone number your text comes will be your business phone number, owned by the business and not the employee. This phone number will be displayed to customers for all text and phone conversations. This helps signal to the lead that you are who you say you are, and builds trust. It also helps avoid spam filters!



How CallDrip Works (*continued*)

3. CALLD RIP CONNECTS YOUR SALES REP TO THE LEAD

Will CallDrip, all you need is your phone! That's because CallDrip automatically kicks off a call to the right sales rep. The sales rep. just needs to answer the call and press 1 to claim the lead. Before the call connects, your sales rep will hear a whispered message with the lead's contact and inquiry details so the sales rep has all the appropriate information prior to being connected with the prospect.



TIP: Save (801) 877-1122 to your contacts; this is the number that will ring you when a lead is coming through

TIP: You can press 3 during the whisper process to repeat the lead information.

4. TALK TO THE PROSPECT WITHIN 30 SECONDS

Right after the whisper, CallDrip dials the lead. Within just a few seconds, your sales team will be having a personal conversation with the lead at the peak moment of interest. You'll probably start hearing "Wow, that was fast!"

TIP: Embrace the speed of response. It's important to have the mindset that it's always better to be first than be 100% prepared and too late.

TIP: Set-up Perfect Voicemail. This is a convenient and efficient way to leave a flawless customer message. Here's how it works: if you catch someone's voicemail, just press #7 and it'll play your custom, pre-recorded voicemail.



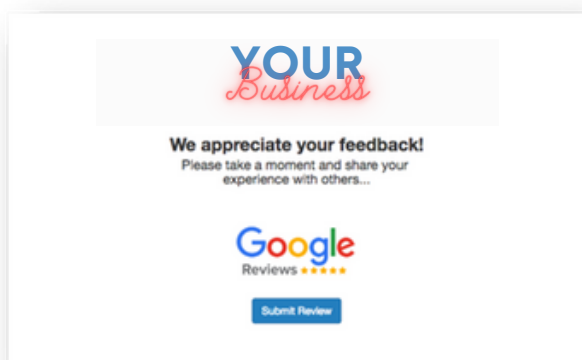
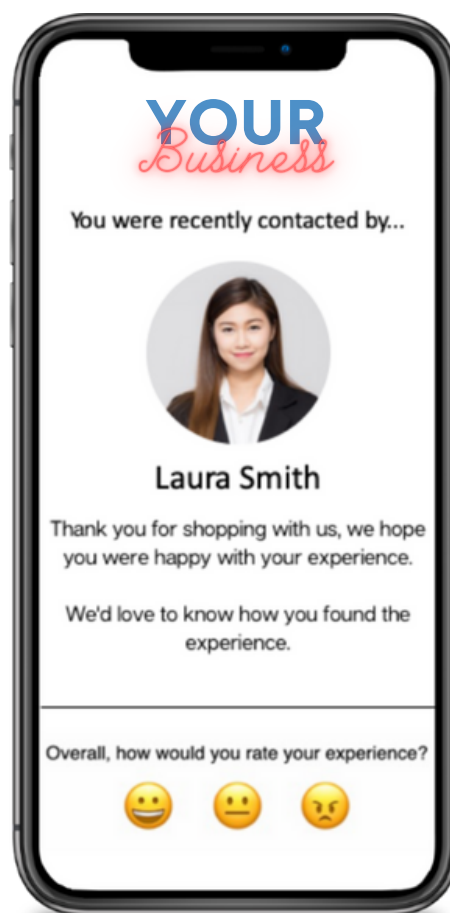
How Calldrip Works (*continued*)

5. AUTOMATED CONVERSATION REVIEW FORM

Calldrip can automatically send out a convenient review form to the prospect regarding the conversation. This configurable feature can be automated so that every phone conversation gets a review form. This ensures you get more online reviews.

This conversation rating provides insight into your customers' experience, the opportunity to resolve concerns and a new review source.

Configurable settings allow you to track information internally or automatically share to your Google My Business panel.



TIP: GMB ranking is determined by overall star rating, business response, and the quality and quantity of reviews. Simply by increasing your customer reviews you can improve your Google searching ranking and make it easier for prospects to find your business

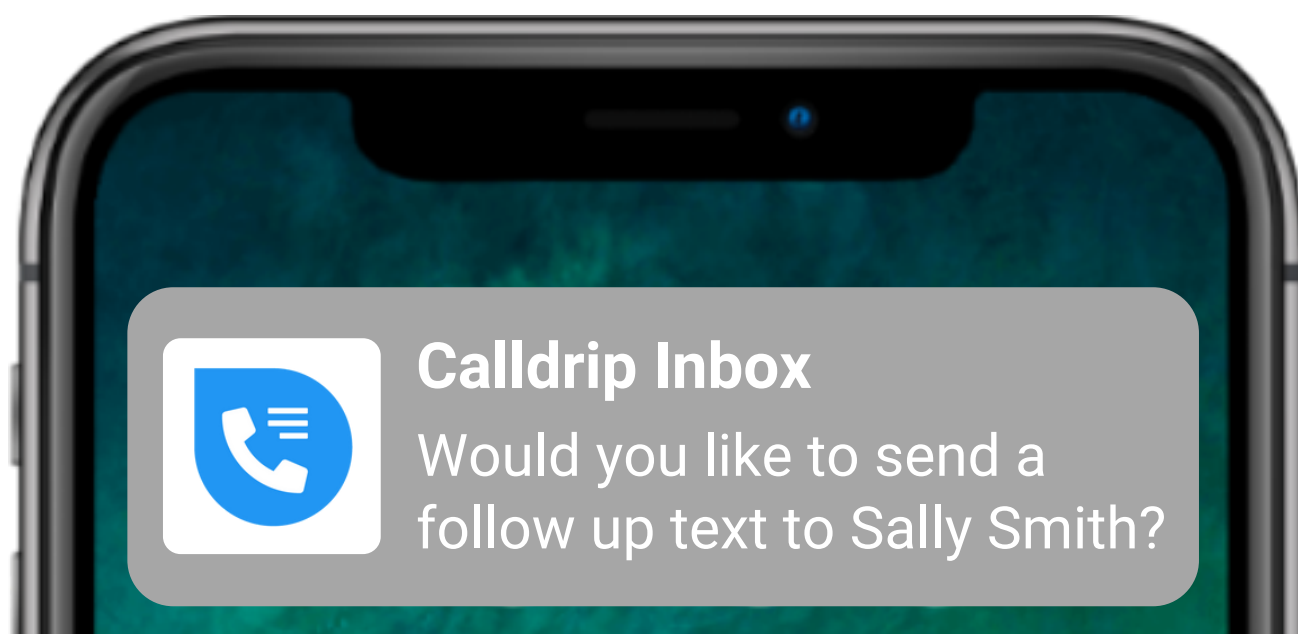


How Calldrip Works (*continued*)

6. INTERNAL NOTIFICATIONS

After you have called the lead, you will be assigned the owner and can receive internal notifications to follow-up with the prospects. Assignment and follow-up notifications are configurable to meet your business sales process.

TIP: Make sure you download the Calldrip app and have it configured to send you app notifications. The Calldrip app is available on the [Apple App Store](#) and [Google Play Store](#).



TIP: The Calldrip app is also a convenient way to update your online profile. You can update your image, bio, phone, email and work schedule. You can also use the app to ask us questions or give us feedback.

< Schedule	
Active	<input checked="" type="checkbox"/>
Sunday	07:00 am - 10:00 pm >
Monday	09:00 am - 05:00 pm >
Tuesday	09:00 am - 05:00 pm >
Wednesday	09:00 am - 05:00 pm >



How CallDrip Works (*continued*)

7. PROSPECT FOLLOW-UP - PHONE

CallDrip makes it easy to follow-up with your customers. You can utilize the outbound Click-to-Call (C2C) built-in to our dashboard, or leverage our CRM integrations to call right from your CRM.


Outbound C2C maintains accountability by automatically logging and recording every outbound call. The advantage of using C2C includes:

- Identify every outbound Click to Call for reporting insights
- Automatically record every conversation for scoring and coaching
- Ability to select the number you want to make the outbound call from
- Visibility into the performance of your outbound efforts

Where can we reach you?

(555) 111-1111 - Primary

(555) 222-2222 - Secondary



Are you sure you want to call Sally Smith.

CANCEL

CALL

TIP: Again, the same phone number will be displayed to customers for all text and phone conversations. This signals to the lead that you are who you say you are, and builds trust. It also helps avoid spam filters!

This phone number will be a company phone number, owned by the business and not the employee. This ensures you always maintain the data and have a record of all conversations. We can procure new numbers for your business, transfer current numbers or even enabling text functionality to your current landline.



How Calldrip Works (*continued*)

8. PROSPECT FOLLOW-UP - TEXT

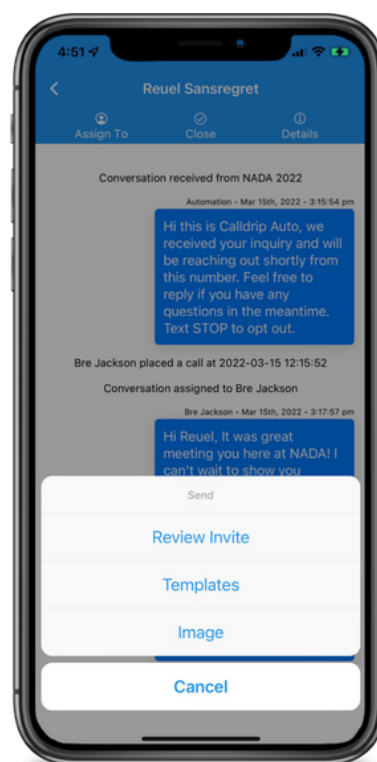
We've also simplified text follow-up to your customers. We allow you to create customizable templates to streamline yet personalize your response process.

These templates may includes your contact details, confirming an appointment, directions to your business, or asking for a review.

You can also create personalized manual text messages based on your prior text and phone conversations.

These may include answering specific inquiries, soliciting further details or providing detailed pricing information.

Having both automated and manual texting functionality provides the ultimate flexibility and streamlines the sales process.



TIP: As mentioned previously, be friendly, yet professional. Texting best practices include:

- *Be brief* - Brevity is always important when communicating with prospects. Correspond using simple, concise messages that can be read within seconds.
- *Avoid abbreviations and all caps* - Even though you are texting, things like acronyms, sloppy or extreme punctuation, and ALL CAPITALIZATION are still inappropriate.
- *Keep things friendly, not pushy* - Friendliness can go a long way in creating a more personal and inviting interaction.



How CallDrip Works (*continued*)

9. INTEGRATED PHONE AND TEXT CONVERSATION HISTORY

CallDrip provides a comprehensive view of all phone and text message conversation history.

This ensures clear and precise prospect follow-up. As displayed in the image below, a complete history of automated text messages, outbound phone conversations, lead assignment, personal text follow-up messages, and inbound call history is easy to see.

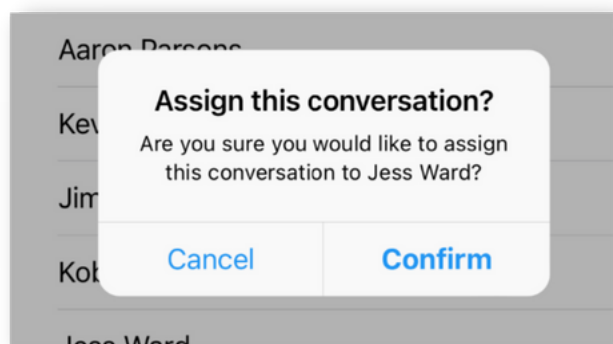




How CallDrip Works (*continued*)

10. TEXT MESSAGE INBOX MANAGEMENT

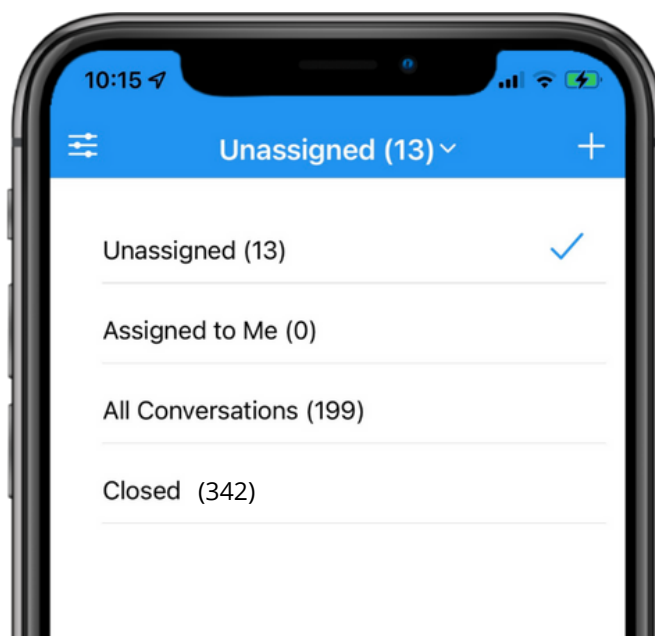
CallDrip provides multiple shared inboxes to streamline your customer outreach. This provides visibility into every contact and conversation and ensures that no opportunity falls through the crack. It's also useful for HR and Compliance purposes.



You can tag, assign, and coordinate with team members in order to make sure every customer is engaged without duplicate replies, thus boosting productivity.

There is also an added layer of collaboration and accountability between team members because everyone is able to see who is in charge of which conversation as well as what has already been said. If a team member is unavailable to respond, it allows another team member to easily pitch in.

Sharing an inbox also provides transparency for management to monitor and pinpoint sales coaching opportunities.



TIP: We recommend closely monitoring of the inbox to ensure all conversations are assigned and as conversations conclude they are marked as closed



How Calldrip Works (*continued*)

11. CONVERSATION ANALYTICS & MONITORING

Calldrip's quality assurance monitoring tools provide visibility into your businesses lead follow-up and your teams conversation quality.

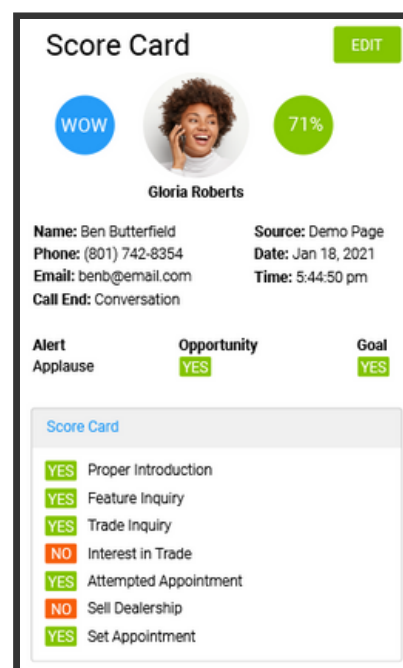
The Calldrip dashboard provides insight into how many leads are connected, response time, call durations, when your leads come in and much more.

It also allows you to see individual sales rep performance - who's taking the most leads, how fast they respond and who is missing opportunities. This ensures your business is always on top of fresh leads and no opportunities slip through the cracks.

In addition to visibility into overall lead handling performance monitoring, we also enable granular insight into individual conversation quality. We configure this monitoring to your business needs with up to 10 customizable KPIs.

These KPIs frequently include: Proper Introduction, Feature Inquiry, Attempted Appointment and Schedule Appointment.

This allows you to identify strengths and weaknesses of individual sales reps and pinpoint specific training improvement needs.



TIP: We recommend monitoring conversations for "Missed Opportunities" to identify sales reps who would benefit from coaching on specific conversational elements.



How CallDrip Works (*continued*)

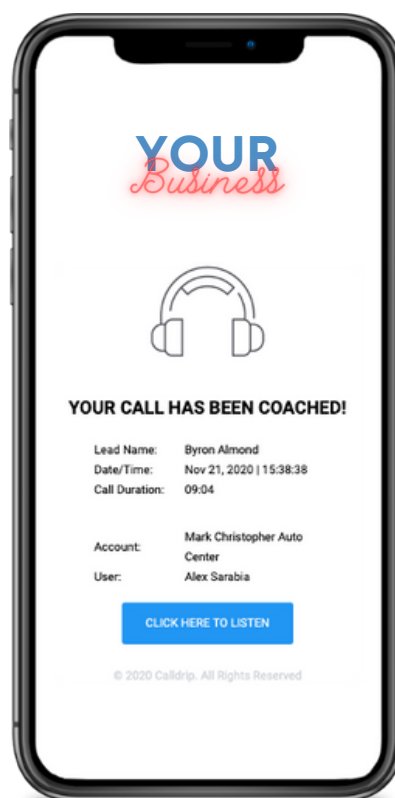
12. SALES COACHING

CallDrip's monitoring capability combined with personal sales coaching tools allows you to take your sales team to the next level.

Our comprehensive built-in coaching tools provide detailed coaching audio and notes. This enables you to implement continuous coaching. With these easy-to-use tools, you can do it yourself, leverage CallDrip-certified professional trainers, or use your existing training team and we'll get them up to speed on our solution.

Our tools allow you to provide cost-effective, continuous coaching on actual customer conversations. This enables personalized, individual coaching for each sales rep. Coaching on specific call elements from actual conversations results in a faster learning curve for your sales reps.

Once a conversation is coached, you can send directly to the sales rep and management for review.



TIP: We recommend 2 - 3 minutes audio coaching, with concise tips from the customer conversations. Make it easy for the sale rep. to remember so they can implement on the next conversation. The best way to coach is an individual, continuous approach that provides constant reinforcement.

TIP: It's also important that you provide sales reps. with concise word tracks so they have a plan prior to picking up the phone. The final pages of this document are call scripts to convert more leads into customers.



How to Incorporate Calldrip Into Your Current Sales Efforts

Calldrip allows you to show your prospects that you care about them enough to meet them where they are, when they're ready, with personalized service.

You no longer have to rely on your team to manually respond to leads and log responses, and monitor performance manually.

Calldrip completely streamlines this process and eliminates gaps. All you really need is your cell phone!

You can now leverage full text and call automation tools to ensure you respond to shoppers at the peak moment of interest.

We recommend setting performance benchmarks for both lead response time, connection rates and conversion of leads into appointments.

Calldrip customers who set a lead response benchmark of under 5 minutes experience a significant increase in sales and customer satisfaction. When you respond in under 5 minutes you are 100x more likely to connect with a prospect.

Appointment rates are dependent on industry, the key element is to inspect what you expect. Monitoring conversations allows you to track and improve on appointment setting. We recommend monitoring all conversations and coaching sales reps on each missed opportunity.

Our coaching philosophy is to provide concise (2-3 minute) personalized coaching of actual conversations. This ongoing approach ensure quick adoption and constant reinforcement.

Best Practices, from the Experts at Calldrip

Here are a few best practice tips for top-notch sales performance.

<2 min.

That's how quickly we recommend that you connect with a lead.

100%

of leads should get a response. Every call and message needs an answer, so that no leads slip through the cracks.

2-3 min.

of coaching based on actual conversations can help improve sales team performance.



Main Benefits of Using Calldrip

There are many different benefits to utilizing Calldrip, all leading back to more efficient and long-term sales. Here are a few:

Improve Marketing & Advertising ROI (Return on Investment)

By responding at the peak moment of interest with a genuine conversation, you can increase online conversion rates, improve customer experience and shorten the sales cycle. Calldrip's tools ensure that you're maximizing your marketing efforts.

Seamlessly Transition from Online to Offline

Today's shoppers start their journey online. Consumers prefer the online convenience to begin the shopping process. Calldrip's Lead-to-Text and Lead-to-Call automations ensure a quick and efficient customer experience to compliment the digital experience.

Maximize The Power of Your Existing Sales Talent

Streamline and standardize your existing manual sales process. Over time, it allows you to build a high-efficiency sales process, without needing to hire a small army of sales representatives.

Optimize Sale Performance

Calldrip improves sales performance in the short term and the long term. This is because, at every step, you're prioritizing your prospects while seeking standardization. The built-in coaching tools enable ongoing process improvement. Calldrip allows you to pinpoint specific improvement opportunities, with the ability to conduct individual coaching on actual customer conversations.





Helpful Calldrip Resources

If you're looking for additional resources to help improve sales process we have you covered.

[CALLDRIP CONTENT HUB](#)

This resource page provides a comprehensive library of all Calldrip resources, it includes eBooks, Guides and Call Scripts.

[CALLDRIP BLOG](#)

Check out our blog for timely articles to help your business improve sales process and make the most of your Calldrip subscription.

[CALLDRIP HELP CENTER](#)

Learn about new product updates, get answers to frequently asked questions, watch product videos and explore Calldrip integrations.

[CALLDRIP SOCIAL MEDIA](#)

Join us on [LinkedIn](#), [Facebook](#) and [Twitter](#) to get our latest updates, articles and company news.

[PRODUCT SUPPORT](#)

If you need to contact our support team you can always click on the chat widget on our website or dashboard.

- Call us: (801) 877-1111
- Email: support@calldrip.com

TIP: The following pages are call scripts to convert more leads into customers.





Inquiry Response Call Script

This script can guide you during an initial lead inquiry follow-up call. Make sure that your call:

- *Includes a proper introduction*
- *Responds to the inquiry*
- *Explores the relationship*
- *Asks for the appointment*
- *Sells your company*



INTRO

"Hi *(Lead Name)*, this is *(Your Name)* calling from *(Company Name)*! I'm calling to follow up about some information you shared on our website."

FEATURE INQUIRY

"Looks like you submitted an inquiry about *(Product or Service)*. Is that correct?"

Real quick, in case we get disconnected, can I confirm your number is *(Phone Number)*? Great, thanks. So what was it about *(Product or Service)* that caught your eye? Were you looking at anything else?"

EXPLORE THE SITUATION

"Thanks for that information, *(Lead Name)*. To ensure that I'm providing you the most relevant information, I have a few quick questions:

- What are you currently using instead of *(Product or Service)*?
- What's your timeline for making a decision?
- Are you looking anywhere else?"

ASK FOR THE APPOINTMENT

"Thanks for that information. Based on what I've heard, I'd recommend that ("*we get some time on the calendar/you visit our location*") as a next step. I've got a clear sense of ("*how we can help/the product you want*"). Plus, there are a few other ("*ideas/products*") to run by you. Are you available later today? Or tomorrow?"

SELL YOUR BRAND

"In that appointment, you can expect *(Outline What Will Occur)*. Typically, we hear from customers that *(2-5 Benefits of Buying from You)*. I'm looking forward to working with you and seeing how we can achieve those kinds of results for you. Talk to you at *(Appointment Time)*. Thanks again *(Lead Name)* for getting in touch!"



Inbound Call Script

This script will help you answer every inbound call with confidence. Make sure that your call:

- *Expresses gratitude*
- *Offers a chance to introduce yourself*
- *Establishes trust and offers assistance*
- *Sells your brand with authenticity*



START WITH GRATITUDE

"Thank you for calling *(Company Name)!*"

INTRODUCE YOURSELF AND ASK FOR THE CALLER'S NAME

"This is *(Your First Name)*. Who am I speaking with?"

ASK HOW YOU CAN HELP

"What can I help you with today, *(Caller First Name)*?"

EXPLORE THE SITUATION

"Thanks for that information, *(Lead Name)*. I have a few quick questions follow-up questions."

Here are a few examples of questions you might ask:

- *What are you currently using instead of (Product or Service)?*
- *What's your timeline for making a decision?*
- *Are you looking anywhere else?*

ASK FOR THE APPOINTMENT

"Thanks for that information. Based on what I've heard, I'd recommend that *("we get some time on the calendar/you visit our location")* as a next step. I've got a clear sense of *("how we can help/the product you want")*. Plus, there are a few other *("ideas/products")* to run by you. Are you available later today? Or tomorrow?"

SELL YOUR BRAND

"In that appointment, you can expect *(Outline What Will Occur)*. Typically, we hear from customers that *(2-5 Benefits of Buying from You)*. I'm looking forward to working with you and seeing how we can achieve those kinds of results for you. Talk to you at *(Appointment Time)*. Thanks again *(Lead Name)* for getting in touch!"



Voicemail Script

This free script can guide you in leaving an excellent voicemail message. Make sure that your call:

- *Includes a proper introduction of you and your company*
- *Explains why you're calling*
- *Provides clear contact details*



INTRO

"Hi (Lead Name), this is (Your Name) calling from (Company Name)!"

EXPLAIN WHY YOU'RE CALLING

"I'm calling you about the (Product or Service) you were interested in."

Feel free to provide additional information here, if applicable. For example:

- *Is the product back in stock?*
- *Did you get additional information about pricing?*
- *Did they submit an inquiry online that you're following up on?*

Make it clear why you're calling, and why your prospect should call you back.

REPEAT YOUR CONTACT INFORMATION

"Again, this is (Your Full Name), calling from (Company Name). When you're ready to talk more, give me a call at (Your Phone Number). That's (Repeat Phone Number). If you prefer email, my email address is (Email Address). It's spelled (Spell Your Email Address). Thank you!"

TIP: Set-up Perfect Voicemail

Perfect Voicemail is a convenient and efficient way to leave a flawless customer message. Here's how it works: if you catch someone's voicemail, just press #7 and it'll play your custom, pre-recorded voicemail.