Marchex®

RevLocal saves thousands of hours with automation and improves data quality with integration

Increased operational efficiency	**400** hours saved per month in account setup through automation	**30** minutes saved per prep session for client call

RevLocal®

DIGITAL MARKETING AGENCY

CALL TRACKING & ANALYTICS

CALL RECORDINGS

TRANSCRIPTION

LEAD SIGNALS

VOICEMAIL SIGNALS

SALESFORCE INTEGRATION

HEADQUARTERS
Granville, OH

FOUNDED
2010

WEBSITE
www.revlocal.com

RevLocal is a digital marketing agency serving thousands of local businesses and multi-location organizations across the country. Its broad range of services include local search, social media, review marketing, websites, paid advertising and organic SEO to key industries like agencies, automotive, hospitality, retail and more.

RevLocal runs call-based campaigns on behalf of clients that require call tracking for channel attribution. In a recent vendor review process, RevLocal chose Marchex as its call tracking provider.

Business acquisition causes a need for a change in call tracking vendors

After years of working with the same call tracking provider, RevLocal found itself facing a change. Says Zac Herr, Sr. Product Manager at RevLocal, "The vendor that we were with got bought out, so we were naturally in a situation where we had to transition to a new platform. We took that as an opportunity to refresh ourselves on the current state of call tracking options, who the vendors are, and what they offer."

To get started, Herr and team researched the market and selected several providers to investigate further. He explains, "Everybody does the same thing. Everyone's tracking calls, so the feature comparison was just table stakes. It was the relationship that made our shortlist. So, as we were going through the vetting process, we evaluated the responsiveness and the knowledge that the different companies appeared to have, and how they behaved in general on the phone when we'd grilled them with questions because, at the end of the day, we were trying to find a partnership. You can go get a tech solution pretty much anywhere."

RevLocal Deploys Call Tracking Solution Integrated with Its Salesforce Instance

When the RevLocal team evaluated their objectives, they realized they weren't just looking for a direct replacement. Their own business had recently changed in a way that offered new capabilities for integration, and they wanted to take advantage.

Explains Herr, "We recently transitioned to move away from a standard engineering team to a person that could do Salesforce Flow development. We didn't have to rely on a team of developers whose time and resources are limited and very valuable."

With their previous call tracking provider, RevLocal account representatives were required to spend hundreds of hours each month manually setting up every new client. The implementation team wanted to improve this process while they were making the transition to a new provider. The Marchex Salesforce integration works with Salesforce Flow, the Salesforce feature that replaced Process Builder and Workflow Rules.

"When we heard about the opportunity with Marchex to use Salesforce Flow to build processes that automatically set up new clients, it was very timely and appealing to us since it's hard to launch any type of new service offering and migrate thousands of clients."

RevLocal decided to partner with Marchex for a new call tracking solution that would leverage the benefits of Salesforce Flow. Yet, the functionality wasn't the only reason RevLocal chose Marchex. The operational perspective around customization the two teams shared also played a role.

Explains Herr, "The experience we had in vetting other vendors was just very transactional. They took an 'If that's what you want, we'll do it' approach and wouldn't push us to expand further or create a better experience for our clients. Another thing that appealed to us about the Marchex approach was the common ground we shared around customization. Everyone else pushes customization as a huge positive, but customization is not scalable and supportable. So, hearing the Marchex team say, 'We don't want to build custom things because that's not good for you in the long term' was very appealing."

The team implemented Marchex Marketing Edge, which was configured to integrate with Salesforce. For understanding calls, RevLocal uses key Marketing Edge features such as call recording, transcriptions, and call dispositions from lead and voicemail signals. Metrics from the Marketing Edge platform are also pushed into RevLocal's client-facing campaign management system.

> **"A big advantage we've seen is how much faster we can get things off the ground and start showing clients results before they see a second bill come through."**

Zac Herr
SR. PRODUCT MANAGER
RevLocal

Once implemented, the Salesforce integration enabled the RevLocal account management team to automate multiple setup tasks at the appropriate steps in their business workflow for setting up new customer accounts. Now, they only manually intervene when something is unusual. Account managers also have a clear picture of what is happening with each of their campaigns; they can view campaign metrics in their reporting platform where Marchex call tracking data is pushed.

Account reps can take just seconds to see key account details and pinpoint issues such as:

- Lead volume is adequate, but calls are going unanswered
- Calls are being answered, but sales aren't being closed

For a particularly long phone call, reps can skim the transcript for a timestamp and just listen to the part that is going to be valuable for the conversation.

> **"It speeds up analyzing results on the client's end and our end. Clients saw immediate value from it, as did our strategists."**

Zac Herr
SR. PRODUCT MANAGER
RevLocal

Says Herr, "The day-to-day account management is so much easier because we were able to quickly add features like call transcription and scoring where we can review larger amounts of data in a very short time. And because it's automated through setup, for some clients, we can have a website spun up with call tracking features, and report that data back to them within a couple of weeks, which is a very competitive lead time."

RevLocal reaps huge time savings that they redeploy for more strategic work

Removing the manual setup process for call tracking campaigns freed up a lot of time and resources for the RevLocal Account Management team.

> **"For the manual setup work that we automated through the Flow automation, we eliminated around 400 hours a month worth of work that one team was doing."**
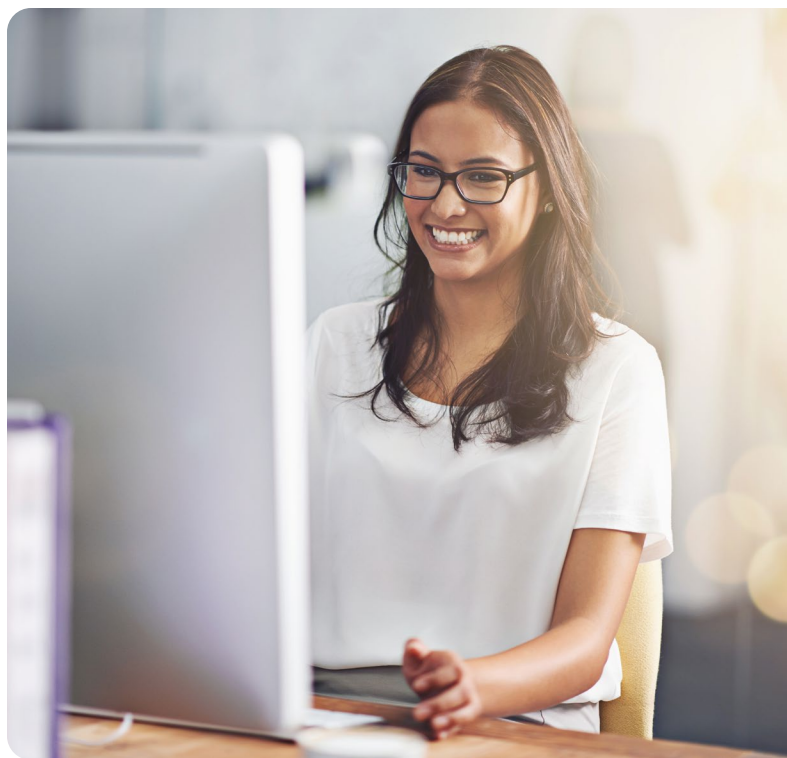
Sean Alberts
PLATFORM SUPPORT MANAGER
RevLocal

Alberts also shared, "Our account managers are saying it's saving them a lot of time before client calls. They used to have to go in and listen to every single call because all we had were the recordings."

With Marketing Edge signals, users can see immediately whether a call was a lead or voicemail and quickly scan the call transcripts right within the platform. They can also search for specific information within the transcript. Herr estimates this saves thousands of hours for account managers since it eliminates 20 to 30 minutes of prep time per client meeting, and they have thousands of clients.

"It's just an insurmountable amount of time," he states.

Account management and onboarding weren't the only teams that benefitted from the time savings. Says Alberts, "We have a different team that was doing the fulfillment that my team supports. I know that they've been able to do a lot more. They've been able to restructure and take on additional work."

Lily Watson is the Platform Support Specialist on Alberts' team and a day-to-day user of the Marchex platform. "I really enjoy the platform. It's simple to use and easily laid out. It's just super easy to navigate and the transition between Salesforce and Marchex is really efficient."

With Marchex Marketing Edge, RevLocal was able to vastly improve call tracking setup and the client experience by implementing an integration with Salesforce. By automating the account setup process, leveraging in-platform call transcriptions and surfacing more granular data in its client-facing campaign tracking portal, RevLocal streamlined operations, saving several hundreds of hours per month. Several teams are seeing more time efficiencies and can redeploy hours to take on more strategic projects. Most importantly, RevLocal clients are benefiting since they are seeing the value of the services earlier in the relationship.