CallBox

MARKETING

USER GUIDE

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OVERVIEW

Call Box is a comprehensive solution to cultivate accountability and reduce inefficiencies in phone handling processes. Thousands of dental practices and DSOs leverage Call Box to capture more appointments, improve staff and location performance, enhance patient experience, and optimize marketing spend.

CAPTURE MORE APPOINTMENTS

IMPROVE PERFORMANCE

ENHANCE PATIENT EXPERIENCE

OPTIMIZE MARKETING SPEND

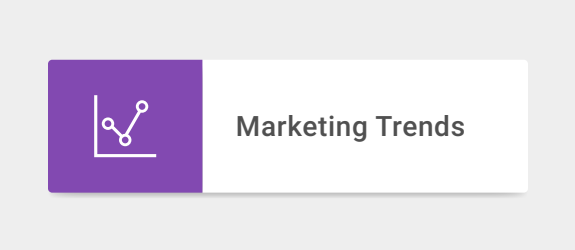
Marketing Teams use Call Box to ensure they are allocating their marketing budgets in the most effective way to capture more appointments. Call Box's data provides detailed reporting to ensure each marketing source is not only driving calls, but also booked appointments. If a marketing campaign is not performing optimally, Call Box's insight will shed light on such challenges to make educated adjustments. Marketing Teams are able to use Call Box's analytics to report back to stakeholders on the success of campaigns and share feedback for future marketing efforts.

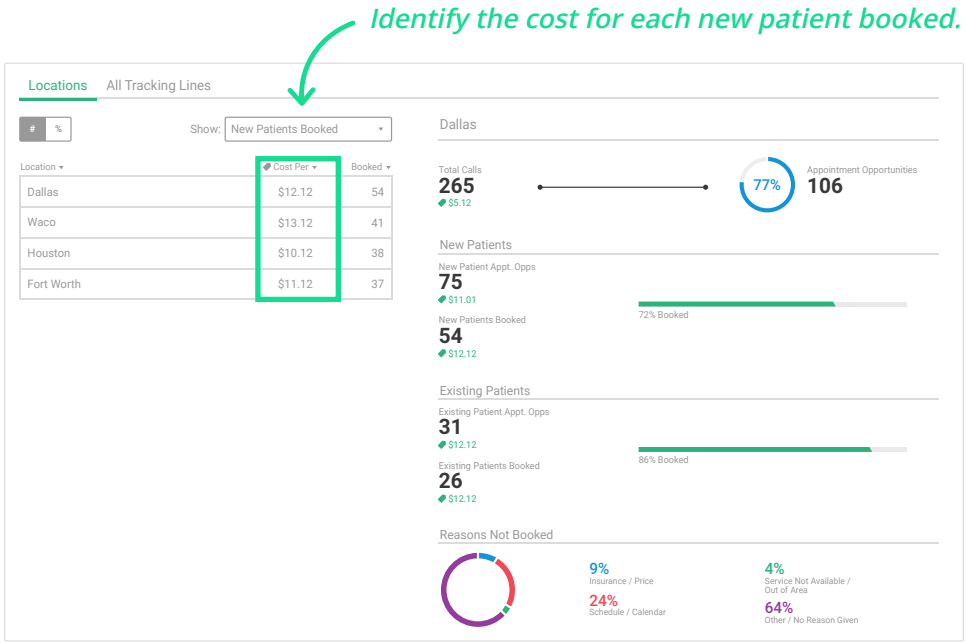
RECOMMENDED USER HABITS

Call Box's reporting provides actionable insight to pinpoint areas of opportunity in marketing campaigns. Marketing Teams are able to set goals for improvement and track ongoing efforts toward growth. Call Box recommends Marketing Teams review and take action on the following reports:

MARKETING TRENDS

Marketing Trends provides an overview of marketing campaign performance for a group of practices. Marketing Teams use this report to get a high-level view of their organization's marketing campaigns and evaluate the effectiveness of their marketing spend.

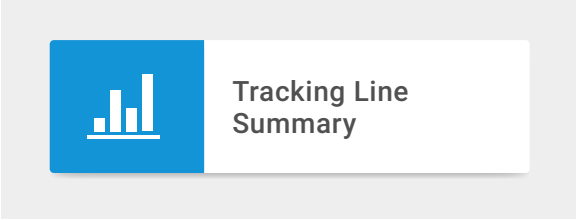




- Analyze marketing performance and trends across locations, drilling down to the success of each marketing source.
- Input monthly average cost per campaign to get a clear ROI and determine exactly how much money is being spent on each appointment opportunity call.
- Focus in on each office individually to determine which campaign works best on an individual office level.
- Make informed decisions on where to allocate marketing spend, whether that's focusing on a particular media or geographic area.

TRACKING LINE SUMMARY

The Tracking Line Summary provides a detailed view of each source Call Box is tracking. Call Box recommends creating a new tracking line for each unique source to ensure accurate metrics and outcomes. This typically includes:



DIGITAL MARKETING SOURCES

Website, Google, emails, social media, etc.

MAIN LINE TRAFFIC

Contact Call Box for options to track main line.

TRADITIONAL MARKETING SOURCES

Mailers, business cards, newspaper ads, etc.

SPECIFIC WORKFLOW CALLS

Referring providers, call-back numbers, etc.

TRACKING LINE CALLS DATA

INDIVIDUAL TRACKING LINE DATA | BRIDGE/EXTENSION TOTAL DATA

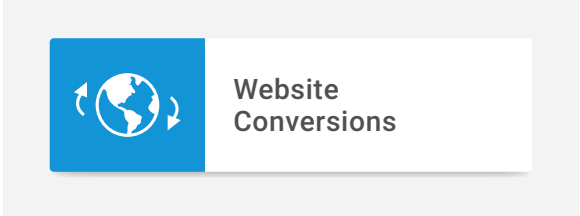
Tracking Line	Calls	Unique	Connected	Appt. Opps (New | Existing)	Appts Booked (New | Existing)	Minutes	Avg. Duration
Main Line 214-123-5678	214	163	206	108 | 81	55 | 60	619	3:00
↳ New Patients	81	61	78	70 | 4	28 | 18	234	4:21
↳ Existing Patients	64	49	61	6 | 52	17 | 21	185	2:13
↳ Billing	29	22	28	9 | 10	3 | 8	84	3:49
↳ Operator	40	31	39	23 | 15	7 | 13	116	2:17
Newspaper Ad 214-123-0123	137	114	131	67 | 36	52 | 32	466	3:56
Google Listing 855-123-4567	136	98	114	56 | 37	40 | 31	275	2:41
Facebook 214-123-3456	50	38	31	13 | 8	9 | 4	175	3:23
Uptown Mailer 888-987-6543	22	19	17	96 | 7	85 | 6	47	5:15

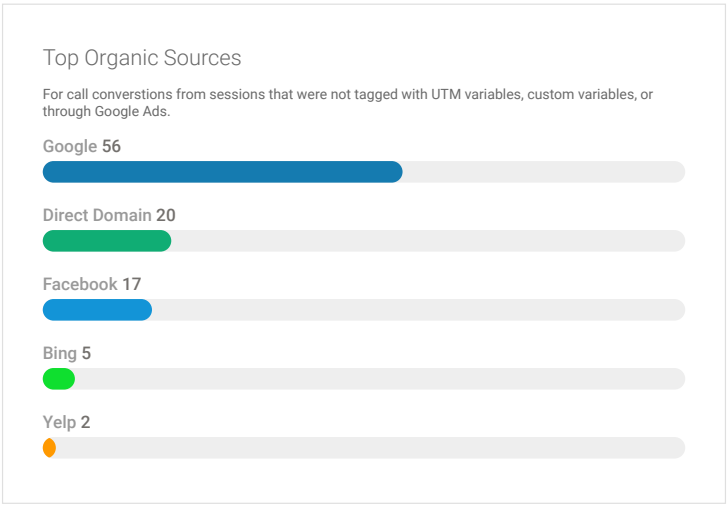
This geographic area generated 85 new patient appointments from a mailer!

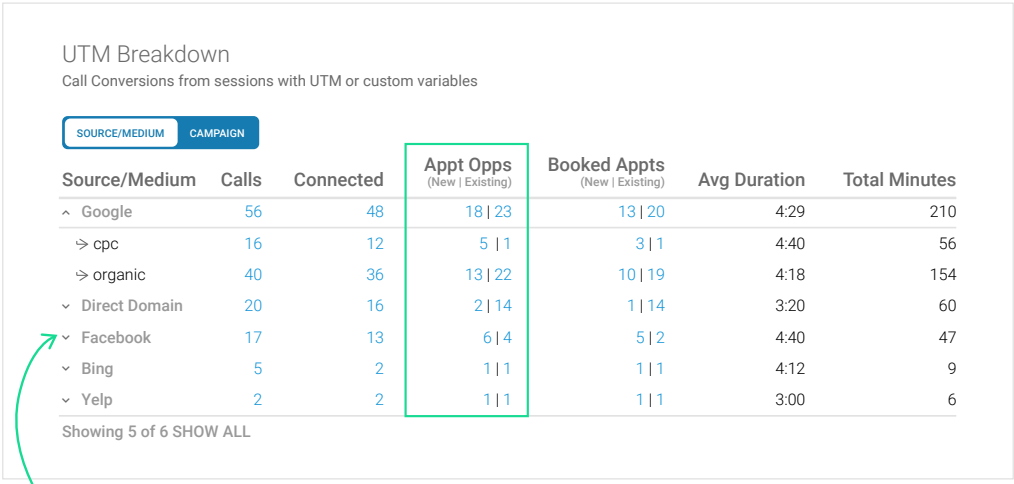
- Pinpoint which sources are driving new patients and booked appointments to identify where to continue investing marketing dollars.
- Break down not only how many calls are coming in on each tracking line, but also the outcome of the conversation.
- Tweak campaigns based on transparent data and results.
- Track direct mail drops and keep tabs on digital marketing efforts to understand which geographic areas respond more favorably to which campaign approach.
- Ensure front desk staff is informed on specific campaigns and uncover gaps in communication of marketing efforts.

WEBSITE CONVERSIONS

The Website Conversions Report details the referring source, keyword, or digital campaign that led to a phone call from your website.



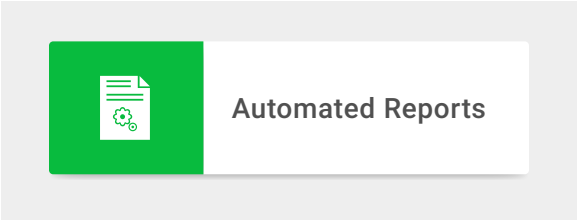




Facebook drove 10 appointment opportunity calls to the practice!

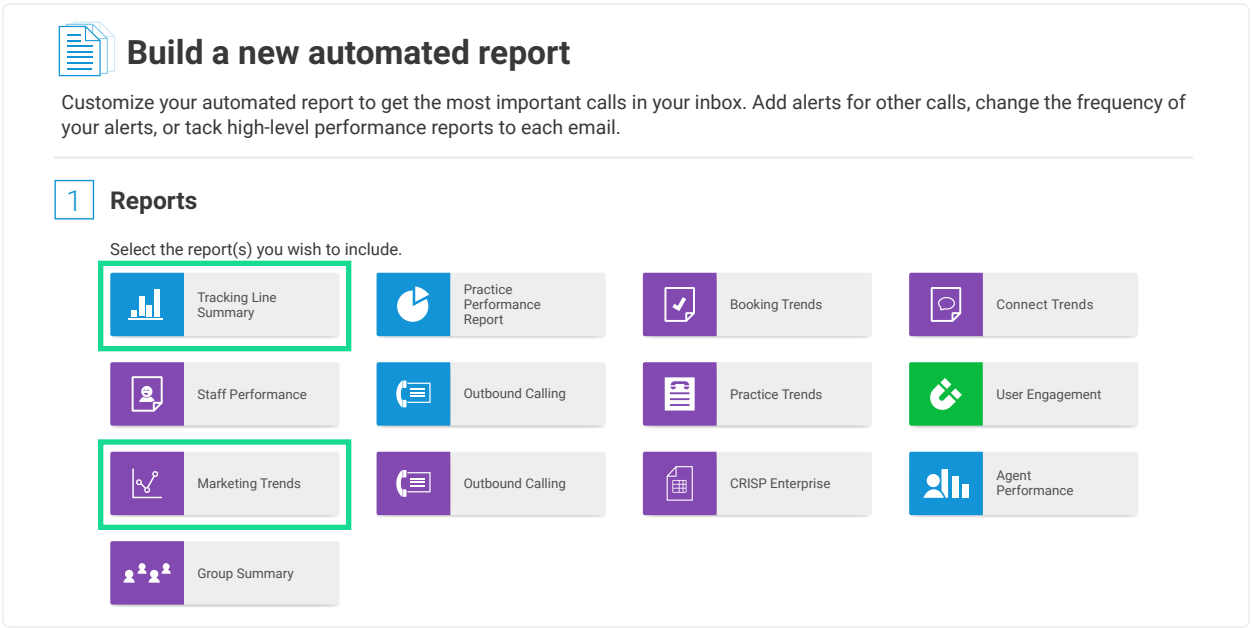
- Access in-depth call details to understand what occurred on each patient's call journey.
- Track not only how many calls came from your digital efforts, but also how many appointments were booked as a result.
- Adjust ad spend based on which digital campaigns, including social media, are performing the best.
- Pinpoint the specific campaigns and keywords that are driving the most appointments with Google Ads and Analytics integration.

RECOMMENDED AUTOMATED EMAIL REPORTS



Automated Reports allow Marketing Teams to receive any of Call Box's reports sent straight to their emails on a daily, weekly, or monthly basis. This enables them to track ongoing performance metrics and ensure marketing efforts are driving results in a convenient and consistent manner. Automated Reports are easy to share with other stakeholders in the organization and collaborate on mutual priorities.

Call Box recommends Marketing Teams set themselves up to receive the following automated email reports to consistently measure goals and identify areas of improvement:



- MARKETING TRENDS
- TRACKING LINE SUMMARY

LEARN MORE

Tips & Tricks

Support

Check out Call Box's Tips & Tricks resource to learn more best practices and tools for leveraging the phone.

Have more questions about Call Box and how to best leverage its solutions?

Click on the Support resource or contact Call Box's Support Team at 214-446-7867.