



KATE DILEO

BUILDING BRANDS THAT DRIVE REVENUE®

# HOW CALLRAIL ACHIEVED A 20% INCREASE IN CONVERSIONS

(In Only 30 Days!)

By Refining Their Brand Message

Kate DiLeo

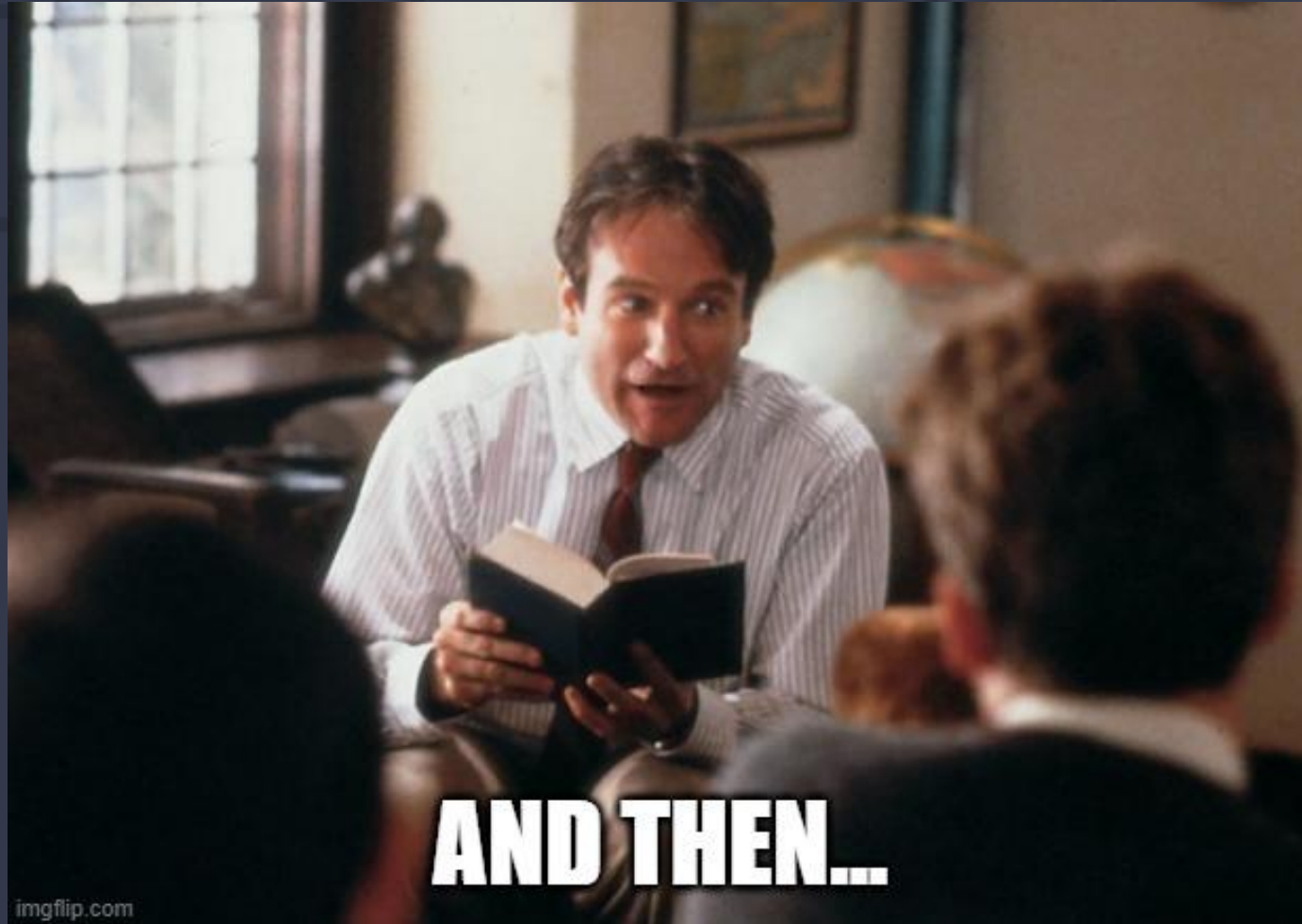
Brand Architect and CEO of The Brand Trifecta®

## After this session you'll be able to:



- ❖ Learn the proven brand messaging methodology, rooted in buyer psychology, that drives stronger sales and marketing outcomes.
- ❖ Recognize pitfalls to avoid so that your brand creates the “you get me” moment your prospects need to convert.
- ❖ Understand how to shift key components of your brand message so it compels buyers to take the right action.

Quick story time.



# The sea of brand sameness:

FATHOM

Fathom Team Edition | Referral Program | Help | Testimonials | Sign In

## Increase productivity with the #1 rated AI Notetaker

Fathom records, transcribes, highlights, and summarizes your meetings so you can focus on the conversation.

**Get Started - Free Forever**

WORKS WITH

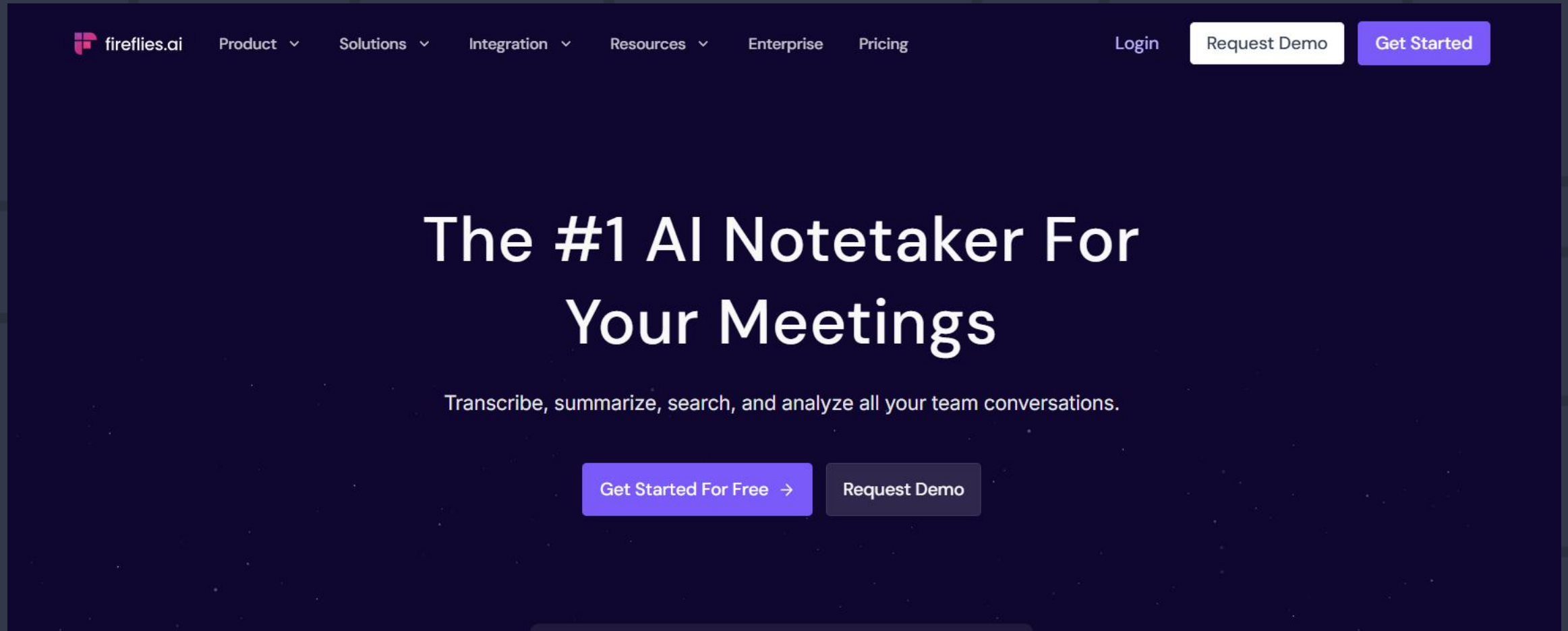
Zoom | Microsoft Teams | Google Meet

Zoom | Microsoft Teams | Google Meet

(I really like to be #1)

Source: <https://www.fathom.video>

# Another one?



The screenshot shows the Fireflies.ai website homepage. The navigation bar at the top includes the logo 'fireflies.ai', menu items for 'Product', 'Solutions', 'Integration', 'Resources', 'Enterprise', and 'Pricing', a 'Login' link, and two buttons: 'Request Demo' and 'Get Started'. The main content area features a large heading 'The #1 AI Notetaker For Your Meetings' and a sub-headline 'Transcribe, summarize, search, and analyze all your team conversations.' Below this are two buttons: 'Get Started For Free ->' and 'Request Demo'.

(Well, now I'm on a data hunt...)

Source: <https://www.fireflies.ai>

# You have GOT to be kidding me...

Otter.ai breaks \$100M ARR barrier and launches industry-first AI Meeting Agent suite. [Learn more](#)



Solutions ▾

Pricing

Apps & Integrations

Resources ▾

Schedule a Demo

Log In

Start for Free

## The #1 AI Meeting Agent ✨

Never take meeting notes again. Get transcripts, automated summaries, action items, and chat with Otter to get answers from your meetings.

Start for Free

(I'm sticking to analog!)

Source: <https://www.otter.ai>

# The state of the union:

## MARKETING, SALES, AND LEADERSHIP FEEL THE PAIN

- ❖ Lack of differentiation – especially in an AI era
- ❖ Immense pressure to perform
- ❖ Financial impacts:
  - *Higher customer acquisition cost*
  - *More competitive sales cycles*
  - *Lower pipeline and/or lost deal flow*
  - *Lower revenue*



# Get off the hamster wheel:

BRAND IS THE PATH OF LEAST RESISTANCE TO REVENUE®

- ◇ #1 way to differentiate your brand
  - *NOT a campaign*
  - *NOT thought leadership*
- ◇ Step 1 = brand message refinement
- ◇ Brand should create conversations that convert
- ◇ Requires a formulaic approach
  - *Rooted in buyer psychology*



# The Brand Trifecta®

A PROVEN AND FORMULAIC BRAND MESSAGING MODEL

## ◆ Tagline

- *What you do*

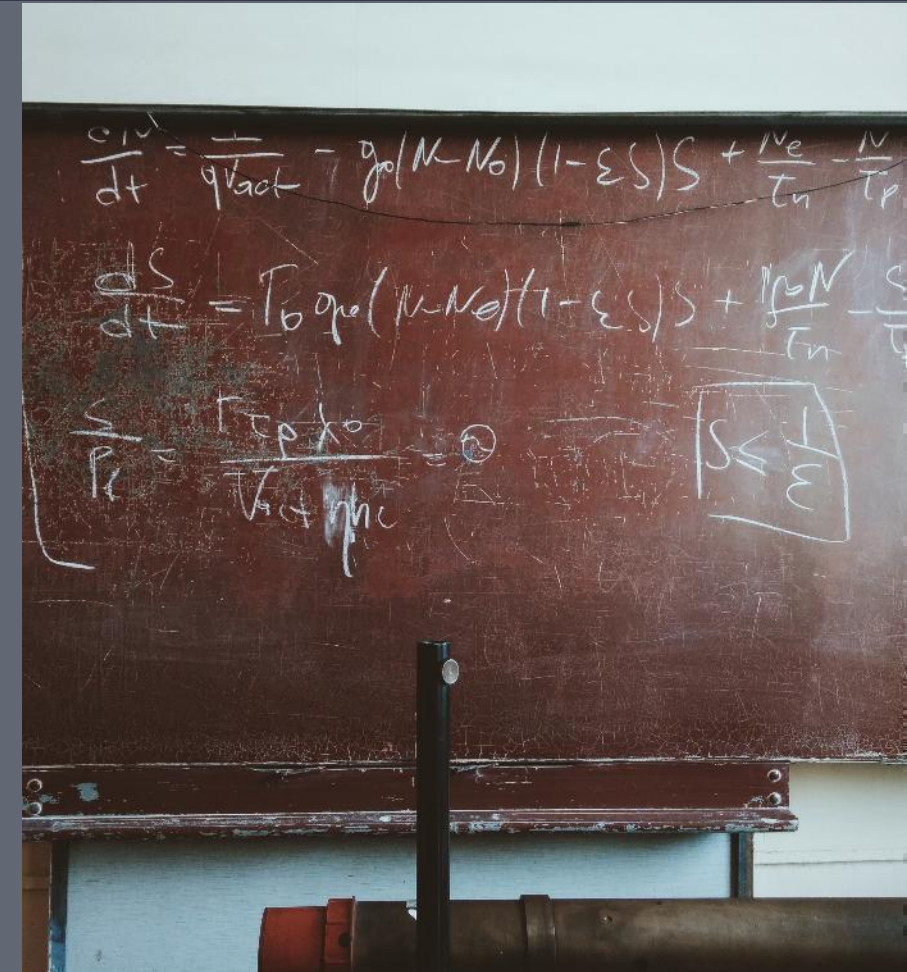
## ◆ Value Proposition Statement

- *How you solve your customer's problem*

## ◆ Differentiator Statements

- *How you differ from the competition*

## ◆ A + B + C = conversion moment



# The two big musts:

GREAT BRANDS FOLLOW THESE TWO PRINCIPLES

## ◆ #1 What and how you say it matters.

- *Word choice*
- *Tone of voice*
- *Grammar and punctuation*

## ◆ #2 Order of operations matters.

- *Don't break the order of The Brand Trifecta®*
- *Storytelling comes after The Brand Trifecta®*



# The Brand Trifecta<sup>®</sup>

## 1. TAGLINE

- ◇ 1st line of defense in your brand
  - *B2B brands: what you do*
  - *B2C brands: promise of the experience*
- ◇ Short and precise phrase
- ◇ Provocative, not pretentious
- ◇ Generates a response from prospects...
  - *“Really? What do you mean by that?”*



# The Brand Trifecta®

## 2. VALUE PROPOSITION STATEMENT

- ◇ Expounds on your Tagline
- ◇ Answers the initial question...
  - *“What do you mean by that?”*
- ◇ Says how you solve the heart pain
- ◇ Creates the “You get me!” moment
- ◇ Compels a critical comparison moment
  - *Imperative for prospects to convert*



# The Brand Trifecta<sup>®</sup>

## 3. DIFFERENTIATOR STATEMENTS

- ❖ Says how you are better than the rest
- ❖ Max 3 – 5 bullet points
- ❖ Macro Level – not all features/benefits
- ❖ Speed, delivery model, proprietary approach, unique technology, level of service...
- ❖ Addresses the critical comparison moment
- ❖ Brings prospects to the point of conversion



# The buyer psychology:

## THE METHOD BEHIND THE BRAND TRIFECTA® “MADNESS”

- ◇ The “how/what” question signals conversion
- ◇ Until prospects hear The Brand Trifecta® ...
  - They are not ready to know the details!
- ◇ Creates a natural content hierarchy
- ◇ Opens the door for story-based content
  - Features/benefits, video, long-form content
- ◇ Prospects self-select into the process (convert)



# Remember these two?

GREAT BRANDS FOLLOW THESE TWO KEY PRINCIPLES

## ◆ #1 What and how you say it matters.

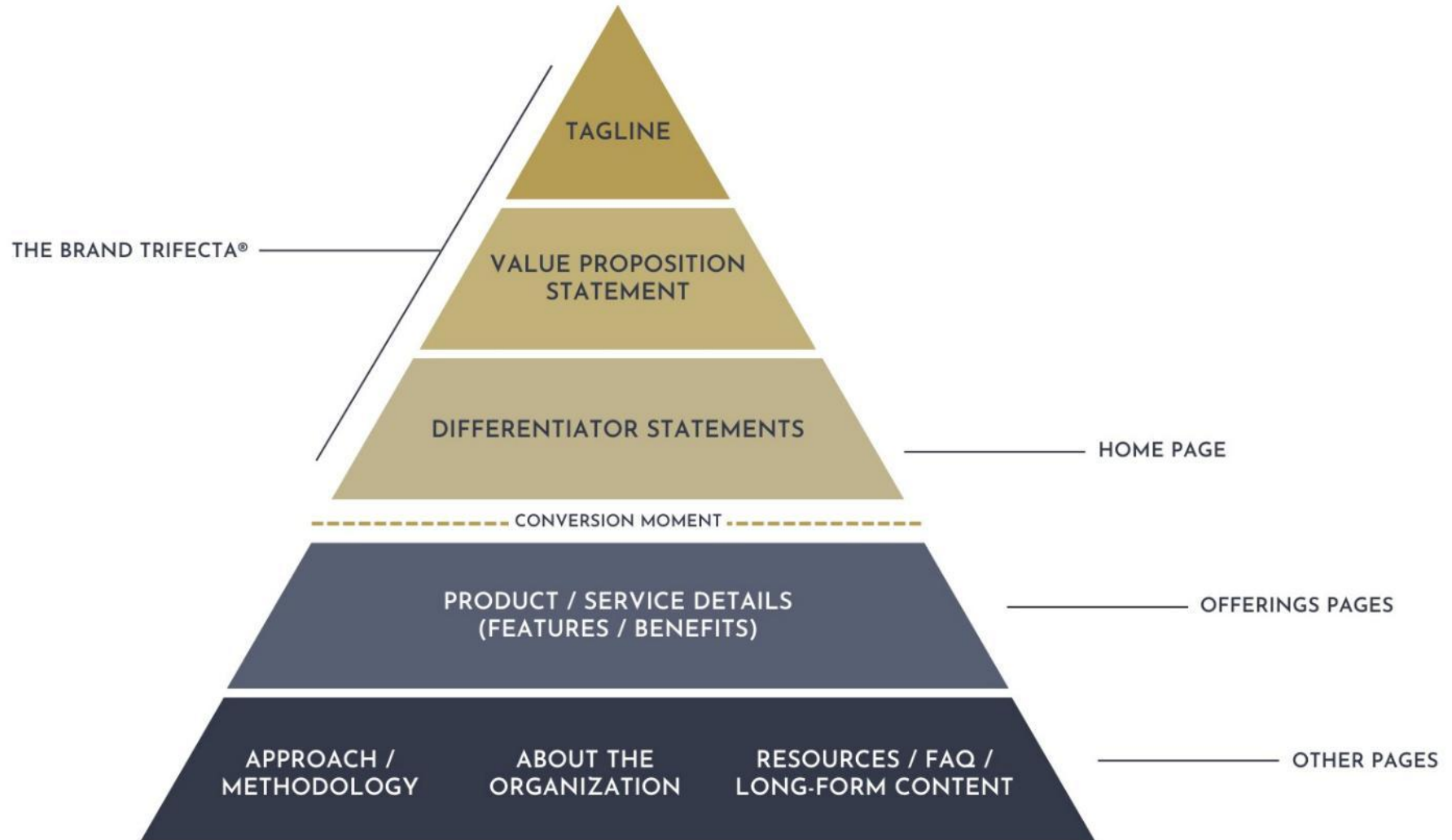
- *Word choice*
- *Tone of voice*
- *Grammar and punctuation*

## ◆ #2 Order of operations matters.

- *Don't break the order of The Brand Trifecta®*
- *Storytelling comes after The Brand Trifecta®*



# Order of operations



Buckle up.



# Meet CallRail:

## CALL TRACKING AND LEAD CONVERSION SOFTWARE

- ◆ \$100 Million in Revenue, 220,000 customers
- ◆ Target audiences: SMBs and marketing agencies
- ◆ Average Revenue per Customer: \$260
  - *Low dollar, high volume play*
- ◆ Website generates a few hundred trials per day
- ◆ Free trials convert into paid customers

The CallRail logo is displayed in a blue, sans-serif font on a white background. The word "Call" is in a smaller font size than "Rail".

# Meet CallRail, cont'd:

100% INBOUND PRODUCT-LED AND MARKETING-DRIVEN

- ◆ Strong SEO and GEO strategy
- ◆ Sophisticated sub-verticalized paid media strategy
  - *33% of conversions from organic search*
  - *20% from paid search*
  - *25% from agencies (channel partnerships)*
  - *22% from email other paid channels*

The CallRail logo is displayed in a blue, sans-serif font. The word "Call" is in a smaller size than "Rail", and the "i" in "Rail" has a dot. The logo is centered on a white background.

# The Reality of the situation:

## WHAT'S GOING ON?

- ◇ Strong brand, product, and tone of voice
- ◇ Shift from just call tracking to all-in-one platform
  - *Move from AI being a (+) to central to the brand*
  - *Product and message evolution...*
- ◇ So...how strong is their brand message?
  - *Weigh it against The Brand Trifecta®*



# CallRail: Before

**CallRail** Products ▾ Pricing Industries ▾ Resources ▾ (888) 291-1691 Support Login 🔍 [Start free trial](#)

Seems disjointed - are they call tracking, AI, or both?

Length of Tagline is a bit long...

## Call tracking + AI that turns calls into higher close rates

Love the rotating piece of the Tagline!

Trying to tie it to outcomes!

**Current Tagline**

[Sign up free](#) [Get a demo →](#)

Try a free 14-day trial, no credit card required.

**Where's the Value Proposition above the fold of the page? Oh no!**

**CallRail** Home Activity Reports

Timeline > Romero, Henry

Henry Romero  
532-555-9876 📞  
Tulsa, OK

Total transactions: 1  
First Call: May 11, 2023 2:15pm

Initial Source: Billboard

Call Tracking helps you know where your leads are coming from to optimize your spend

# CallRail: Before

Strong, simple sentiment that is in line with the brand's tone of voice

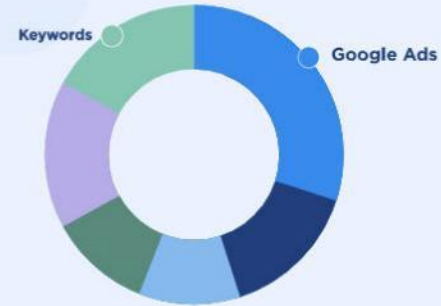
## Market with confidence

CallRail's Call Tracking lets you track calls, texts, forms, and chats as easily as you track clicks. Get the metrics you need to spend smarter on everything from paid search to print ads in one easy, powerful dashboard.

[Learn more](#) →

Current Value Proposition Statement

Calls by Source



Slightly pointing to the all-in-one platform concept but it's getting buried

Uh oh! We are missing Differentiators!



Power of 3 not 30!

**Optimize** your campaign spend

Consistent length and tone

**Don't waste** another penny on under-performing campaigns. See which channels generate more leads and maximize your ROI.



**Deliver** a personal touch, at scale

**Tailor** every lead's experience with personalized call routing, hold messaging, and other automations based on their campaign source.



Action-oriented language

**Bring in** more of your best leads

**Illuminate** the patterns and needs of your highest-value customers by tapping into automatic conversation analysis and lead scoring.

Product Positioning (Feature/Benefits)

# CallRail: Before

- ◇ **Tagline:** Call Tracking + AI that turns calls into...
  - ◇ *Campaigns that convert; more quality leads; cost savings; higher close rates; your competitive advantage*
- ◇ **Value Proposition Statement:** Market with Confidence. CallRail's Call Tracking lets you track calls, texts, forms, and chats as easily as you track clicks. Get the metrics you need to spend smarter on everything from paid search to print ads in one easy, powerful dashboard.
- ◇ **Differentiator Statements: NONE**
- ◇ **Product Positioning (Feature/Benefits):**
  - **Optimize your campaign spend.** Don't waste another penny on under-performing campaigns. See which channels generate more leads and maximize your ROI.
  - **Deliver a personal touch, at scale.** Tailor every lead's experience with personalized call routing, hold messaging, and other automations based on their campaign source.
  - **Bring in more of your best leads.** Illuminate the patterns and needs of your highest-value customers by tapping into automatic conversation analysis and lead scoring.

# CallRail: After

CallRail

Products ▾

Pricing

Industries ▾

Resources ▾

(888) 930-5887 Support Login 🔍

Start free trial

Moving from just calls to a focus on conversations

Make every **conversation** count. "Count" has a double meaning

New Tagline

"connects the dots" brings it all together without saying "all-in-one platform"

When your business is **on the line**, you can't afford a **disconnect** between marketing and revenue. CallRail **connects the dots** between campaigns, conversations, and customers for **faster growth and better ROI**.

Clear outcomes

Sign up free

Get a demo →

Try a free 14-day trial, no credit card required.

Call-related plays on words

New Value Proposition Statement

Pain is identified. Action is compelled.

RR CallRail Home Activity Reports ?

Timeline > Romero, Henry

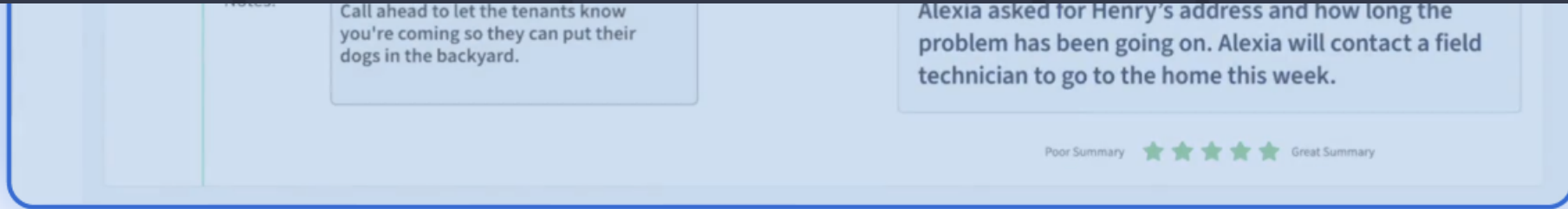
Henry Romero  
532-555-9876 📞  
Tulsa, OK

Total transactions: 1  
First Call: May 11, 2023 2:15pm

Initial Source: Billboard

Call Tracking helps you know where your leads are coming from to optimize your spend

# CallRail: After



Continue with other content after The Brand Trifecta®

New Set-Up Statement

## Meet CallRail

Calls out size of client base

New Differentiators

Shifts the product paradigm

The **lead engagement platform** that **200,000** businesses trust to optimize their marketing, attract quality leads, and convert more customers.

**BOLD!**

**Easy.** We **promise** speed to value.

**Trusted.** We focus on accuracy.

**Physical sentiment**

Engage your customers with **complete peace of mind** with CallRail's unbiased attribution data, clear conversation insights, and **dependable AI** assistants.

**Connected.** We are partner-rich.

Integrate your data with **thousands** of tools – from CRMs to ad platforms – plus, access **7,000+** marketing experts through CallRail's diverse partner network.

**Boldly owns the numbers!**

Turn of Phrase

In a matter of minutes, you can set up CallRail to track **every** lead, unlock insights from **every** conversation, and build **AI** agents to capture and qualify **every** lead.

Uses repetition

**AI is no longer a (+) but embedded throughout the message**

# CallRail: After

- ◇ **Tagline:** Make every conversation count.
- ◇ **Value Proposition Statement:** When your business is on the line, you can't afford a disconnect between marketing and revenue.

CallRail connects the dots between campaigns, conversations, and customers for faster growth and better ROI.

- ◇ **Meet CallRail:** the lead engagement platform that 200,000 businesses trust to optimize their marketing, attract quality leads, and convert more customers.
- ◇ **Differentiator Statements:**
  - **Easy.** We promise speed to value. In a matter of minutes, you can set up CallRail to track every lead, unlock insights from every conversation, and build AI agents to capture and qualify every lead.
  - **Trusted.** We focus on accuracy. Engage your customers with complete peace of mind with CallRail's unbiased attribution data, clear conversation insights, and dependable AI assistants.
  - **Connected.** We are partner-rich. Integrate your data with thousands of tools—from CRMs to ad platforms—plus access 7,000+ marketing experts through CallRail's diverse partner network.

# The impact of the update:

LAUNCHED SEPTEMBER 2025

- ◆ Within 30 days:
  - + 19% in website conversion rate (CVR)
  - + 20% in trials (start a free trial)
  - + 21% in units (new paid customers)
- ◆ Traffic to website stayed steady
- ◆ No new campaigns or tactics deployed



# The takeaways:

## PRACTICAL YET POWERFUL BRAND SHIFTS YOU CAN MAKE

- ❖ Create the “you get me” moment
  - *Tagline + Value Proposition Statement*
- ❖ Focus on differentiation BEFORE product details
  - *Don't miss the critical comparison moment*
- ❖ Don't break The Brand Trifecta® formula
- ❖ Focus on order of operations for content



# The takeaways, cont'd:

## PRACTICAL YET POWERFUL BRAND SHIFTS YOU CAN MAKE

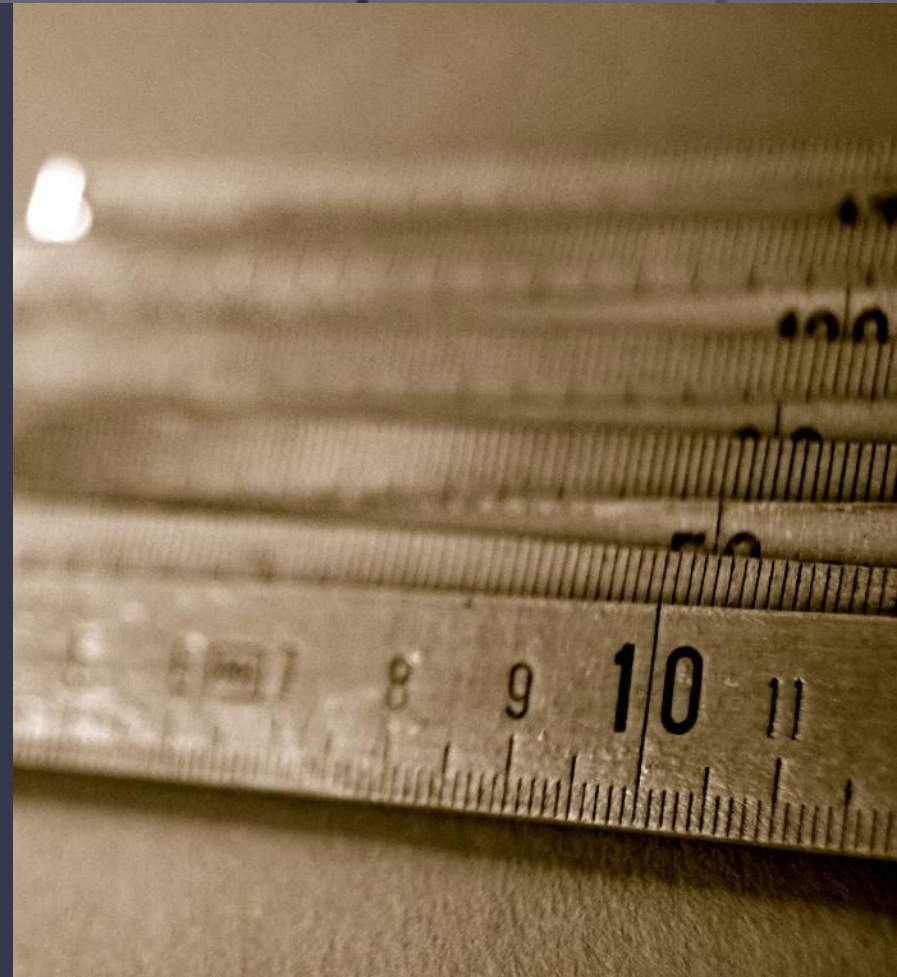
- ❖ Skip complex storytelling - NO paragraphs!
- ❖ Each line should draw you further in
  - *Whether reading it or hearing it*
- ❖ Own your tone of voice and personality
- ❖ Leverage language and concepts that are working
- ❖ Don't rip and replace. Dial it in! Do the ¼ turn!



# The metrics that matter:

SERIOUSLY – TRACK THE HECK OUT OF THEM

- ◆ Pipeline – including quality of prospects
- ◆ Revenue and margins
- ◆ Sales cycle – overall efficiency
- ◆ Conversion rates
- ◆ Referrals
- ◆ Repeat buying



# Now what?



- ❖ **Step 1:** Develop your Brand Trifecta® message
- ❖ **Step 2:** Implement consistently across ALL channels
- ❖ **Step 3:** Try it out for at least 60 – 90 days!
- ❖ **Step 4:** Track those metrics while testing
- ❖ **Step 5:** Adjust the message if needed

# Thank You + Q&A

LET'S CONNECT

◇ [linkedin.com/in/katedileo/](https://www.linkedin.com/in/katedileo/)

◇ [kate@katedileo.com](mailto:kate@katedileo.com)

◇ [katedileo.com](https://www.katedileo.com)

GET IN TOUCH + FREE RESOURCES

