

## Providing Lead-to-Call Automation, Dynamic Call Distribution, Call Tracking and Analytics, CallerReady is enabling Pay-Per-Call Marketers to Connect Prospects to the Right Sales Person faster and determine the best ROI



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**Interview conducted by:**  
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**CEOCFO: *Mr. Charlson, what was the vision when you started CallerReady and where are you today?***

**Mr. Charlson:** The vision was to help companies connect with their sales prospects faster, and allow people looking for information to connect to the right sales person as quickly as possible. That is largely what we still concentrate on today for our customers. Our customers rely on phone calls to conduct business and are focused somewhere on the continuum of telesales call center operations, pay-for-call advertising or tracking return on investment for their marketing programs, somewhere in that space where their business is conducted over the phone. Today, CallerReady continues to focus on connecting people in need quickly with the right person to assist them, helping performance marketers and advertisers determine which advertising is actually achieving the best ROI, and managing their pay-per-call advertising programs.

**CEOCFO: *What is the key to getting it right?***

**Mr. Charlson:** The key is understanding where our customers are. Each one is in a different place in regard to its exact business goals and the specific problems they're trying to solve. Finding the right entry points with our clients to solve problems and help them grow is the key. It may sound simple, but it can be quite complicated. And their needs can change rapidly so staying with our clients and providing the right solutions as their needs evolve is essential to getting it right.

**CEOCFO: *Would you walk us through a somewhat typical engagement?***

**Mr. Charlson:** Typically a client is using a phone system that isn't capable of giving the type of responsiveness or tracking that the customer is looking for. They would come to CallerReady to do more configurable call routing and call distribution that can instantly connect callers to the right sales person. Our technology keeps people from waiting on hold and allows clients to connect right away, which takes the friction and fatigue out of the process for requesting live human to human assistance. That is the typical entry point. Another entry point is call tracking, where the client is looking to understand the effectiveness of their advertising on channels like Google Adwords and Facebook, and take the data from keyword to phone call and then all the way through to the sale to figure out which keyword groups, audiences and ad units are yielding the most fruit. That would be a CallerReady Call Tracking implementation.

Then, if there is more that they want to do with the data integration of systems...that is where CallerReady can really shine! We have the ability to communicate with legacy systems or other systems such as a sales CRM and internal

databases that we can integrate with and provide unique solutions. For many of our clients it would be very difficult and time-consuming to in-house develop and maintain the types of solutions that CallerReady can quickly deploy for them.

**CEOCFO: *Where does human element, gut-feeling or experience come in with regard to the results?***

**Mr. Charlson:** There is really two sides of it. On the advertising side, it is all about what is going to give the best yield with regard to finding the right type of customer for our clients. So the advertising can start with gut-feelings, but must be refined and course-corrected using the results. This involves trial and error to refine the targeting of their marketing efforts.

On the call center operations side, the human element is all about people management and efficiency. We try to make people's jobs easier to do. For call center agents we are asking, "Is this simple enough to make the call center agent's job easier and less confusing?" We ask, "How do improve compliance with the business process by making things easier?"

For the call centers managers, we provide easy visibility into agent productivity statistics for how they managing their time during an 8-hour workday. The software provides insight into how much time are their sales professionals spending on the phone handling inbound calls, making outbound calls, idle time and time spent away from their phones. So our clients can look at how the agents are spending their time.

Many of our clients are not typical of what you might think of when envision a large inbound or outbound call center. Many of our clients are doing both, handling inbound calls and making outbound calls to follow-up with their sales leads. Their agents are doing many different things, so trying to manage productivity there is a bit more challenging. We have reports that will show how long the agents are logged in and available when they are "set to away". In addition, our reports detail how many calls they are declining per day, how many outbound calls they are making, how many inbound calls are they accepting, how many times did the system automatically send them away because they are not answering their phone. The telephone has been around for a long time. So has managing workforce productivity. The tools that we provide allow our clients to understand how their agents are acting and who is out of bounds and needs more direction.

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**CEOCFO: *Why is it so hard to get it right?***

**Mr. Charlson:** Everybody has opinions on what the experience should be, but when you have different competing priorities there are constraints around what that experience is like. For example, we have one client that wants to look up all the information they have about you on file and construct an on-the-fly compilation of that, but that process takes about thirteen seconds. The tradeoff is, do you want the person to actually answer and have all the right information, or do you want the phone to be answered instantaneously without the information necessarily being available every step of the way. That is one example but there are always competing tradeoffs in how to get it right. The other thing is people can come in with jobs requesting to make things 100% the way they want it. However, in trying to get them exactly the way maybe one manager envisions the process to be, can introduce a lot of complexities that may have unintended consequences; which can be getting it right for a certain set of use-cases, while you inadvertently made it wrong for some other use-cases.

**CEOCFO: *Which services get the most interest and which services do you offer that people are not recognizing?***

**Mr. Charlson:** One of the things that we do very well is referred to as lead-to-call automation. That is using the power of automation to connect online requests via the phone to connect to people that made the online request as fast as possible. Businesses generally fail to appreciate how to make that process fast and instead will let different sales methodology get in the way, or will make excuses like "this is just the way we have been doing it", and will not be responsive to their new inbound sales requests. Even though how to respond to your leads more quickly is a relatively old problem, we are getting the word out to organizations that it's much easier to implement something like a CallerReady solution than it was in the past. That's because we are cloud based and play well with existing Legacy systems. Therefore, you can have great success overnight with regard to getting back to your leads quicker.

**CEOCFO: *Are there many companies that can work with legacy systems the way CallerReady does?***

**Mr. Charlson:** Not that I have seen in terms of how easy it is for us to integrate with our clients' needs due to the flexible open data layer that underlies our system. I think we succeed because instead of trying to modify Legacy systems, CallerReady flexes to fit the need and become 'plug compatible' with what already exists when we are filling in the gaps with enhanced functionality.

**CEOCFO: *We took note of CallerReady from LeadsCon Conference. How do you stand out when you are at a conference and there are so many competing ideas and companies?***

**Mr. Charlson:** With CallerReady it is focusing on niches where there is good word of mouth and our success with our clients leads to referrals. That is the best element of growth for us. To stand out, CallerReady has several patents and patents pending around unique things that we are able to do in the market place with regard to our Pay-Per-Call offering and how we do call distribution. We just stand out being true to offering differentiated value, but also not to necessarily get sucked in to every new shiny tech offering. We try to stay focused on what we need to do to help our customers scale, and how we continually offer items that allow CallerReady to scale. We have to be choosy about what elements we develop, because we can do so much and the world of technology moves so quickly. Oftentimes that means passing on an opportunity and looking to partner with another company that may be operating like that.

**CEOCFO: *What surprised you as CallerReady has grown and evolved?***

**Mr. Charlson:** I think the surprising aspects are when you work on a problem that seems like it's a niche problem, and then several years go by, and all of a sudden everybody is asking about a solution for that problem. That has been surprisingly how new ideas get into the market place and sometimes it is not a straight path and just how much business continues to be done on the telephone. Over the past eight years we've been doing this people would say nobody wants to talk on the phone anymore and millennials are just texting. There is a certain truth to that, but so much can still be done with voice. We have had to adapt to changes in user behavior and do more with text messaging as well. New stuff keeps coming, but one of the surprising things is that the power of the voice connection from afar continues to be an important part of the way many businesses are conducted.

**CEOCFO: *The CallerReady site indicates your guiding principles, "Twice as good and half the cost, speed is life, fast, fun and friendly". Would you explain these principles?***

**Mr. Charlson:** Fast, fun and friendly is how we try to operate with regard to our internal communications to try to move as quickly as we can and have a fun and respectful environment. With our clients, we like to offer unlimited access to our support professionals as needed during business hours, via voice, emails and text chat. Many times with our clients they need a lot more support upfront and once they're up and running not nearly as much, so we try to go above and beyond when we are onboarding clients. "Twice as good and half the cost" refers to alternatives in the marketplace where we offer differentiated services, so with Legacy phone systems like Genesis or some of those types of systems, and where we're well below half the cost. Oftentimes we will talk with prospective clients that are looking for the lowest cost telecommunications, but that is not how we differentiate or what we exist to do. If you just put us up against the lowest cost telco solution or lowest cost dialer system that's not comparing apples to apples, Speed is Life and Fast, Fun and Friendly are cultural constructs I picked up from working at Target. It means we keep open friendly communications channels inside the company and with our client and we operate as fast as we can to deliver results for our clients.

**CEOCFO: *Is there much in the way of physical equipment, or is it all in the software?***

**Mr. Charlson:** It is all in the software, but the interesting thing is that's the way it's been to date. We are getting more and more requests to work with hardware phone systems and we are rolling out full integrations with Internet Protocol Phones, which are desk phones made by companies like Cisco manufacturers. We have always been able to call any destination hand-set that has a phone number, but using more modern communications protocols we can now for example sim-u-ring your desk hardware handset as well as an online phone at the same time, and then whichever you choose to answer we will connect you on. That is as close as we get to hardware but it is more than we have done in the past. Obviously our servers exist. We do have hardware but our clients don't need it. They minimally need a headset connected to a computer and a chrome browser, but other than that just a cell phone or a handset. Our clients tend to be very focused on controlling the experience of their agents, so trying to allow mixed phones is often not the best case. Meaning soft phones will always perform much better than cell phones.

**CEOCFO: *What do you look for in your people?***

**Mr. Charlson:** I want to see passion about customer service and problem-solving. We need people that get energized by solving problems for our clients and that have the desire to satisfy them, while pushing themselves to achieve things that are important to our customers. I look for what motivates them, are they motivated to serve and solve problems and have the intellectual mind and enough horse-power to do it. Not everyone needs the same amount, but from the different roles at CallerReady, you may work with a light technical complexity, and you need to deal with that. Whether you are on the frontlines, coding on the backend or doing system maintenance work, everything requires technical aptitude and the desire to solve problems.

**CEOCFO: *Is it difficult to attract good people?***

**Mr. Charlson:** The market is tighter and I do think in our economy whether you're a contractor or a volunteer, everybody has options and a lot of skills to offer. Attracting the right people that want to work in a company culture and have the right skill set, can be difficult. We are always looking for a person who would be a good addition to the CallerReady team.

**CEO CFO: *Why choose CallerReady?***

**Mr. Charlson:** CallerReady is the go-to platform for those sales organizations that are looking to scale their business and performance marketers that want anything that you could desire in call tracking and routing solutions. CallerReady has complete systems for managing pay-per-call, for managing telesales organizations and for tracking advertising. It is one platform that you can come to and get best-in-class solutions. If you need something that we do not have, if it makes sense, we are going to build it for you.

