Pulse Reporting Walkthrough: From Basics to Executive Insights

NEXT 2025

The *Heart* of Hospitality

Agenda

- Speaker Introductions
- Executive Summary Overview
- Reporting Deep Dive
  - Call Abandonment
  - Res|Lead Rate
  - Conversion
  - Campaigns
  - Leads
- Q&A

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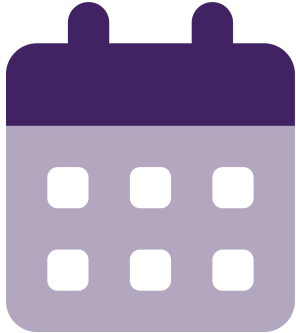
Today's Speakers

Katie Gaddy
Lead Senior Customer
Success Manager

Jim Golightly
Director of Key Accounts

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Session Highlight - TrackPulse Call-Routing

TrackPulse Call-Routing

Presented by **Katie Lingle**

Date: Wednesday, February 4th, 2025

Time: 9:00 AM to 10:30 AM Central

Location: Ballroom C/D

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Between the Executive Summary Report and the Push/Roll-Up Report, which of these are you receiving automatically today?

Executive Summary Overview

- Good report for getting started and understanding high level KPIs
- Broadest view across the business focused on Pulse

The Executive Summary does not tie 1:1 to single reports in Track, but we'll look at specific reports that you can use to drill down for further analysis starting from the Executive Summary

Themes:
- Booking Data
- Call Center Volume KPIs
- Campaigns
- Agent Performance
- Leads

On the next few slides, we'll look the data that's available in the Executive Summary Report - thanks to Emerald Isle Realty for allowing us to use their report as an example.

TRACK

Executive Summary
Emerald Isle Realty
February 2023

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Historical and Future Bookings

TRACK Executive Summary — **Historical Revenue** February 2023

Month	Bookings	Booking Window	Revenue	Avg. Booking	Nights	ADR	ALS
February 2023	1018	134	$3,670,427	$3,606	10237	$358.55	10.06
January 2023	1499	172	$6,448,950	$4,302	13054	$494.02	8.71
December 2022	675	198	$3,376,903	$5,003	7560	$446.68	11.2
November 2022	904	223	$4,178,779	$4,623	8527	$490.06	9.43
October 2022	893	244	$3,638,163	$4,074	8084	$450.04	9.05
September 2022	815	231	$3,244,124				
August 2022	1020	224	$5,254,845				
July 2022	1233	246	$6,712,661				
June 2022	759	185	$3,607,595				
May 2022	718	130	$2,491,601				
April 2022	720	115	$2,157,653				
March 2022	1036	107	$3,226,880				
February 2022	1106	131	$3,803,811				
January 2022	1514	164	$6,802,046				
December 2021	787	188	$3,783,759				

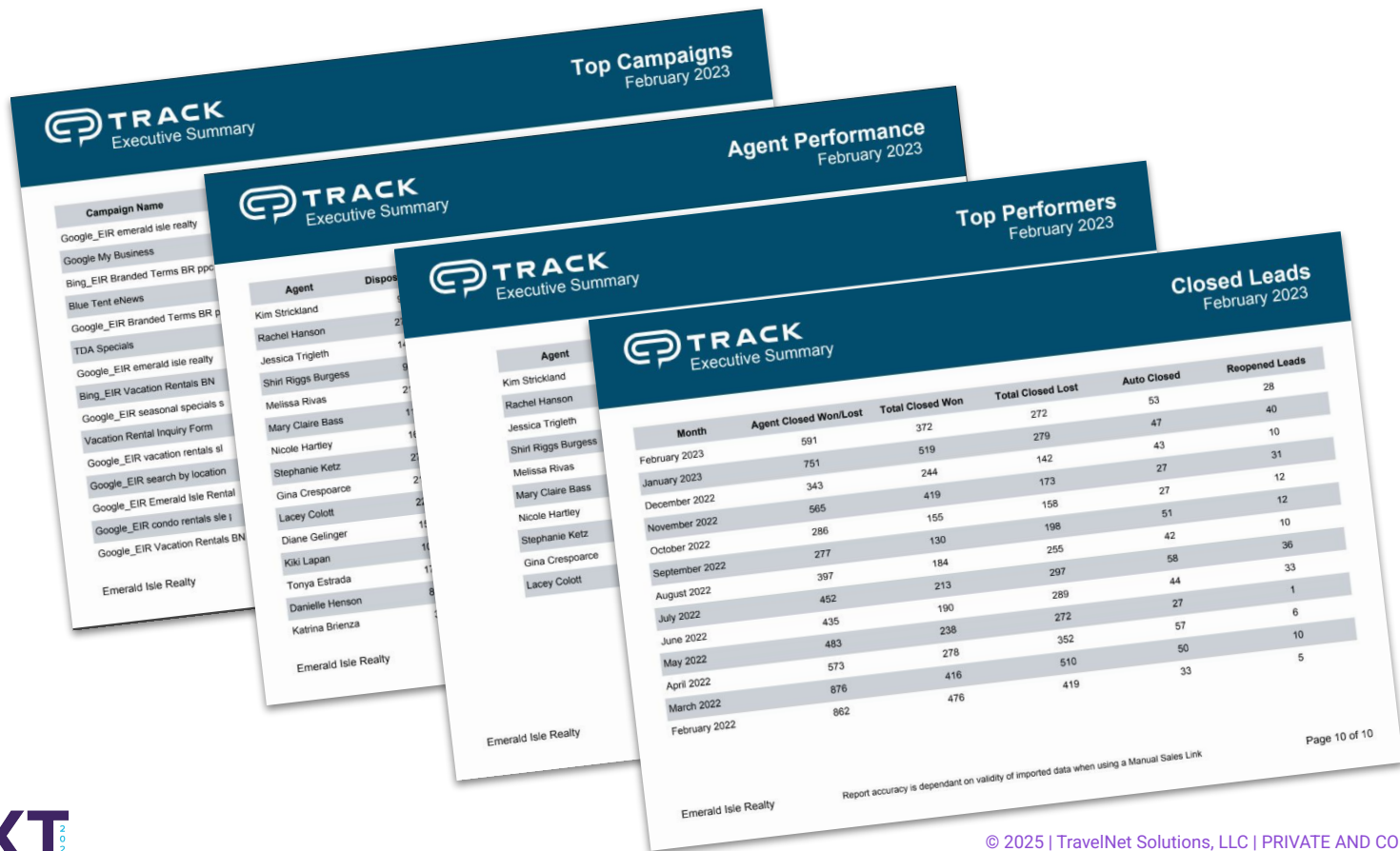Emerald Isle Realty — Report accuracy is dependant on validity of importe...

TRACK Executive Summary — **Advanced Booking Pace** February 2023

Month	Bookings	Booking Window	Revenue	% of Sales	Avg. Booking	Nights	ADR	ALS
February 2023	19	5	$51,954	1.42%	$2,734	626	$82.99	32.95
March 2023	79	27	$133,592	3.64%	$1,691	940	$142.12	11.9
April 2023	124	56	$280,778	7.65%	$2,264	1638	$171.42	13.21
May 2023	121	93	$371,997	10.13%	$3,074	1226	$303.42	10.13
June 2023	166	120	$757,943	20.65%	$4,566	1548	$489.63	9.33
July 2023	187	152	$767,018	20.90%	$4,102	1674	$458.19	8.95
August 2023	158	182	$736,512	20.07%	$4,661	1127	$653.52	7.13
September 2023	98	213	$373,484	10.18%	$3,811	749	$498.64	7.64
October 2023	45	241	$130,068	3.54%	$2,890	392	$331.81	8.71
November 2023	9	273	$29,964	0.82%	$3,329	85	$352.52	9.44
December 2023	3	299	$18,705	0.51%	$6,235	113	$165.53	37.67
January 2024	1	348	$2,996	0.08%	$2,996	14	$214.00	14
February 2024	4	352	$14,095	0.38%	$3,524	70	$201.36	17.5
Remaining	4	460	$1,322	0.04%	$331	35	$37.77	8.75
Totals	**1018**		**$3,670,427**		**$3,606**	**10237**	**$358.55**	**10.06**

Emerald Isle Realty — Report accuracy is dependant on validity of imported data when using a Manual Sales Link — Page 2 of 10

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Call Center KPIs

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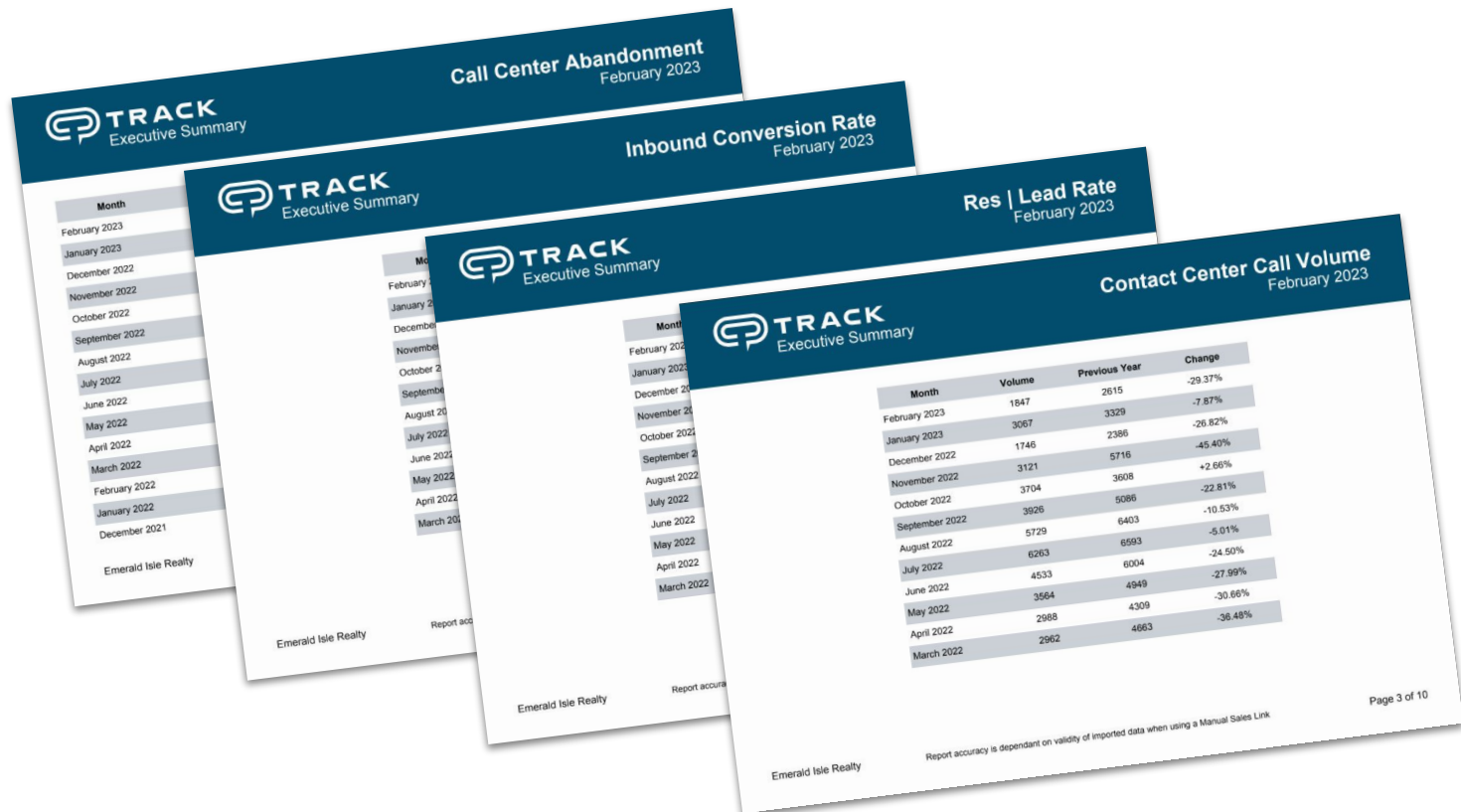
Campaigns, Agent KPIs, Closed Leads

Push/Roll-Up Report

Push / Roll Up Report

← Back To Reports

Report Parameters

Run Report   Export as Excel   Report Help

Category	Yesterday	Last 7 Days		Month to Date		Year to Date	
		Current	Last Year	Current	Last Year	Current	Last Year
	01/23/25	01/17/25 - 01/23/25	01/17/24 - 01/23/24	01/01/25 - 01/23/25	01/01/24 - 01/23/24	01/01/25 - 01/23/25	01/01/24 - 01/23/24
Basic Metrics							
Avg Handle Time (min)	4.49	8.96	5.99	6.82	5.89	6.82	5.89
Avg Speed to Answer (sec)	0	24.43	26.34	23.58	25.52	23.58	25.52
Gross Abandoned Calls	0	3	8	23	40	23	40
Net Abandoned Calls	0	3	6	18	28	18	28
Gross Abandoned Rate	0	1.2%	1.47%	1.77%	1.69%	1.77%	1.69%
Net Abandoned Rate	0	1.2%	1.11%	1.39%	1.19%	1.39%	1.19%

- Helpful snapshot of your day-over-day call center KPI metrics
- Includes Year to Date, Month to Date, and Last 7 Days metrics
- Includes a breakdown of call dispositions during the time period

Similar to the Executive Summary, this is an unfiltered, broad snapshot, but is a helpful automated resource to get started with reporting

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Reporting Deep Dive

Call Abandonment

One of the first metrics customers tend to look at is call abandonment:

"What is the percentage of calls that entered a call queue, but were not answered by an agent?"

Most customers invest heavily in marketing to generate phone calls, and it's important to ensure that marketing investment is not wasted!

We recommend targeting an abandonment rate of **less than 10%**. To measure your abandonment rate, we find it easiest to use the **Average Speed to Answer report** for a date range and, optionally, a queue or queue group.

Average Speed to Answer - How effectively is my team answering calls? Drill down further to identify scheduling issues:
- By Day of Week
- By Hour of Day

Let's take a look at a live example of Call Abandonment here.
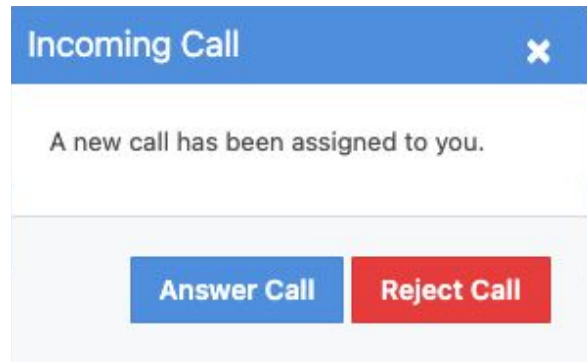
Call Abandonment - Drill Down

If you are trying to diagnose or correct high abandonment, you can investigate further using a handful of additional reports:

The **Agent Call Diagram** report will help you understand, "Are agents answering the calls that are offered to them?"

The **Agent Productivity** report will help you understand, "Are my agents available enough to take calls presented to them?" Note: Make sure your agent status warning/urgent thresholds are configured to help agents manage their availability.

The **Agent Conversation Productivity** report will give you a better sense of how long agents are spending in conversation and/or wrap-up after a call.

You can also use the **Queue Abandonment Report**, which will show you how long clients are willing to wait in a queue. This helps you understand if you need to extend out your max wait time so that calls are not going to failover giving you the opportunity to grab more calls.

If your agents are answering most of the calls assigned, and the calls are appropriate length… you may need to add staff.

Understanding Res|Lead Rate

The next metric we'll review is the **Res|Lead Rate**.

"What percentage of calls handled by my agents are dispositioned as a reservation or lead call?"

In general, any call where dates, rates, availability, or unit information is discussed should be considered a Res|Lead Call.

We recommend an inbound Res|Lead Rate of 35% or more. To measure your inbound Res|Lead Rate, we recommend the Call Conversions Report, filtered to inbound calls. When measuring your Res|Lead Rate, look for a consistent rate across agents. A realistic and stable Res|Lead Rate is important to ensure your conversion rate can be accurately measured. If your conversion rate is 90%, but your Res|Lead Rate is 3%, your conversion rate isn't actually 90%.

Let's review a live example of the Call Conversions Report to review the Res|Lead Rate here.

Auditing/Adjusting Your Res|Lead Rate

If your Res|Lead Rate is very low, this is a good opportunity to review how your calls are being dispositioned. To do this, run the Agent Conversation Results report. If the majority of your calls are being dispositioned as non-lead calls, you can audit those calls to determine if they should actually be dispositioned as a lead call.

We recommend auditing **10 calls per week for new agents**, and **3 calls per week for tenured agents**.

Understanding Inbound Call Conversion Rate

The next metric we'll review is perhaps one of the most important - your **Inbound Call Conversion Rate**.

"What percentage of inbound Res|Lead calls were booked during that call?"

Your inbound call conversion rate is one of the key call center metrics for Pulse, as it directly ties to sales revenue.

Inbound conversion rate should be realistic. 100% conversion rate would indicate an agent's calls are not being marked appropriately. We recommend targeting a conversion rate of 30%.

To measure your inbound call conversion rate, use the same Call Conversions Report as the Res|Lead Rate, filtered to inbound calls.

Let's review a live example of the Call Conversions Report here.

Improving Inbound Call Conversion Rate

The best way to improve an agent's conversion rate is via **Call Scoring**. For a thorough guide on call scoring, see the following Help Center article: How To Score Agent Calls

We recommend scoring 2 calls per week per agent based on your company scoring template. Some best practice recommendations for scoring criteria includes:
- Use a standard greeting
- "Does your smile shine through?" 🌞
- Use the caller's name
- "Did you lead with the experience before quoting price?"
- Ask for the sale
- If not booked, did you get permission to follow up?

Additional sales strategies include:
- Overcome sales objections
- Consider strategies like comp/commissions, promo codes, other incentives to drive conversion
- Create urgency/scarcity

Understanding Outbound Call Conversion

Next is **Outbound Call Conversion Rate**.

"What percentage of outbound Res|Lead calls were booked during that call?"

Outbound call conversion rate is again a key metric of sales output, but it depends heavily on the market, guest demographics, and other factors. For instance, when inbound conversion is very high, outbound conversion may be low, and vice versa.

Due to the these factors, we don't publish an industry standard outbound conversion benchmark. We do recommend that a customer clearly define their outbound strategy, however, as it's one of the key strengths of Track Pulse and lead management.

A customer can measure their Outbound Call Conversion and Sales via a handful of reports, including:
- Call Conversions Report, filtered to Outbound calls
- Agent Booked Revenue
- Agent Call Diagram, filtered to Outbound calls

Additional Reports

Lead Reporting

Track's Lead Management allows a customer to incorporate leads from other source types besides phone calls, including email, chat, voicemail, and manually entered leads. You can use the following reports to better understand your overall lead performance:

Lead Conversions Report
The Lead Conversions report shows all leads created during a date range, with the status (open, won or lost), revenue and conversion rate by agent.

Calls/Leads Lost
The Calls/Leads Lost report will provide a summary of the number of calls and/or leads lost by Closed Lost Reason during a particular time period. This report will help identify common objections that could be overcome through changes in price, stay restrictions, or coaching via sales.

Auto Close Report
Track can automatically close leads either based on the arrival date passing, or due to inactivity. The Auto Close Report will help you quickly identify leads that were closed due to Auto Close rules and determine if the agent should reopen the lead and follow up.

This is a good opportunity to also review your Auto Close Rules to ensure they are set as desired.

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Campaign Results

A campaign is how Track attributes various activities and statistics to a marketing source, allowing a property manager to gauge the effectiveness of their marketing efforts, such as calls, bookings, or revenue associated.

Campaigns can be associated with calls, leads, reservations, and sales, and allow a property manager to gauge the effectiveness of their marketing efforts, such as calls, bookings, or revenue associated with that campaign.

The following reports can be used to help understand marketing performance by campaign:

PMS:
- Source of Call Summary - By Campaign
- Source of Call - By Campaign

Pulse:
- Campaign Revenue
- Campaign Statistics
- Campaign Summary
- Marketing Demand

To learn more about campaigns, follow us to our next presentation *Campaign Management with Track*!

Geo Marketing Report

The Geo Marketing Report is useful to understand where your guests are coming from so that you can adjust any geo-targeted marketing, if necessary.

This report also allows a couple of additional functions, including:
- Review "Region" for any corrections that need to be made for consistency purposes
- Drill down by US state to better understand city-level booking patterns within each state

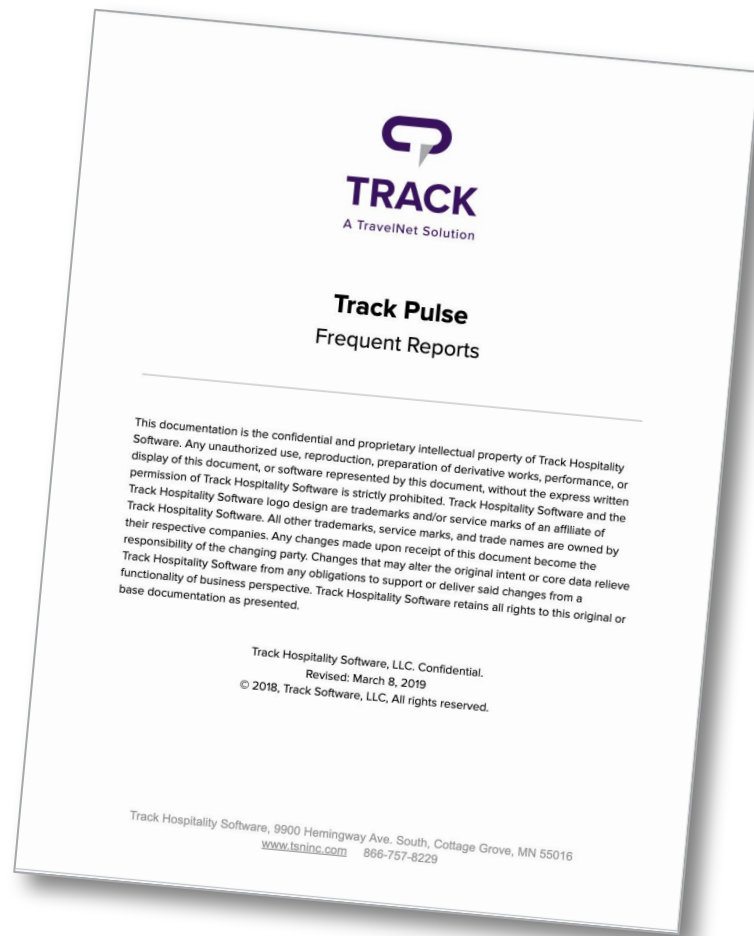Let's review a live example of the Geo Marketing Report here.

Emerald Isle Realty

Sep 1, 2024 – Sep 30, 2024

| Country | Region | Sales | | | |
		Bookings	Nights	Revenue	Avg Booking
US	NC	676	9361	$2,864,969.15	$4,238.12
US	VA	322	2346	$1,847,706.22	$5,738.22
US	OH	97	781	$672,786.96	$6,935.95
US	PA	110	932	$576,656.85	$5,242.34
US	MD	62	512	$423,441.31	$6,829.70
US	NY	52	456	$351,095.13	$6,751.83
US	GA	21	224	$172,824.45	$8,229.74
US	NJ	17	147	$156,141.56	$9,184.80
US	SC	25	185	$129,315.08	$5,172.60
US	TX	15	146	$109,119.71	$7,274.65
US	WV	31	753	$101,250.51	$3,266.15
US	IL	12	84	$87,342.62	$7,278.55
US	KY	8	119	$85,479.89	$10,684.99
US	CA	15	382	$82,654.92	$5,510.33
US	MI	11	82	$80,482.80	$7,316.62
US	TN	14	119	$56,909.15	$4,064.94
US	IN	12	84	$54,910.15	$4,575.85
US	CT	10	77	$51,056.03	$5,105.60
US	FL	8	64	$40,475.70	$5,059.46
US	MN	3	21	$34,271.86	$11,423.95

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Thank You

We appreciate you joining us for today's review of Track Pulse reports and KPIs. We hope you've found this session to be insightful.

Please let us know if you would like a copy of the Frequent Reports & KPIs guide, which goes into even more detail about each KPI, industry standards, and troubleshooting methods.