

# How a Software Company Gets More Customer Engagement with Messaging



## Overview

A SaaS software company discovered that, with text messaging, they can have continuous conversations with customers throughout their relationship.

## Business Challenge

This SaaS software company wanted to keep in touch with customers to build valuable relationships across their customer lifecycle. Although the firm used email to do so, they realized open rates and response rates were low. Since clients couldn't reply to push notifications, they were not suitable for some use cases the company wanted to deploy.

Messaging has a higher open and response rate than email, so the business decided to use this conversational channel for customer engagement.

## Answering the Challenge

Once the firm had zeroed in on texting, they looked for a messaging solution which would seamlessly integrate with Salesforce. Another criterion was integration with Pardot, because the company sends email campaigns to their customers through that software. SMS-Magic fit the bill.

# How a SAAS Company Uses Messaging in the Customer Journey

The business used messages to engage customers with offers, educational content and service updates.

## Communicating Throughout the Customer Journey

The company aims to be in continuous touch with their customers to motivate them to use the software optimally, make them aware of new features, and send administrative information. They use email, push notifications, and messages to do so and feel messaging gets them the best results.

The firm also found that it was easier for their clients to respond to text messages rather than emails. They saw that clients were more likely to respond to their CTA or call back, if they sent them a text.

## For a Free Trial

For instance, the business sometimes offers a free trial of a service to a select group of users. They use text messaging to alert them about the offer.

SENT

Hey, you've been selected for a free trial of our new feature. Check your email for more information.

Customers who have an immediate question reply to the text, so the company can follow-up with them quickly. The message also motivates users to look out for the email the firm sends, which they might not have otherwise opened.

Toward the end of the trial, the business sends another text message, reminding users the trial is ending and asking whether they would like to opt in or opt out of using the feature.

## Combining Messaging with Email

Once new customers are comfortable with using the software, the company aims to educate them about how they can drive business growth through their software. To achieve this, the firm created a series of short industry-specific videos.

The business uses SMS-Magic with Pardot for a drip campaign to these customers that's designed to move customers along in their journey with these videos. Customers receive a weekly text message as part of this campaign.

## Texting for Support

The company provides texting as a support option. When customers have a simple query, or they're stuck, or they want a quick answer, they prefer to start a service request via message rather than call and navigate a phone tree.

The business's inbound call volume reduced significantly due to the increase in customers' texting queries. This has increased their agents' efficiency.

## Replying to Tickets with Messages

When a ticket is generated, the company generates a custom link in the ticket which enables reps to respond to a ticket with a text. Clicking on the link takes customer service reps to the compose a new message screen in SMS-Magic.

## Highlighting the Business Value of Messaging

**Increase in customer satisfaction.** Texting automation has helped the firm keep customers happy.

**Higher reach.** The business estimates they get double the reach with texting as compared to email.

**Greater efficiency.** The company's team has shrunk, although their customers have increased and their business has grown. This is mostly due to automation, which includes SMS-Magic for text messaging workflows.

Messaging has helped the software firm engage better with customers and help them grow.

### About SMS-Magic

SMS-Magic is a proven, global messaging platform for Salesforce, with over 1500 clients accessing 59 direct carriers. SMS-Magic enables Salesforce users to engage buyers and win and retain more new customer revenue, while creating strong customer relationships that drive sustainable competitive advantage. SMS-Magic is the most positively reviewed messaging application on Salesforce AppExchange.



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