

Business Text Messaging: Use Cases for Marketing, Sales and Support



WHITE PAPER

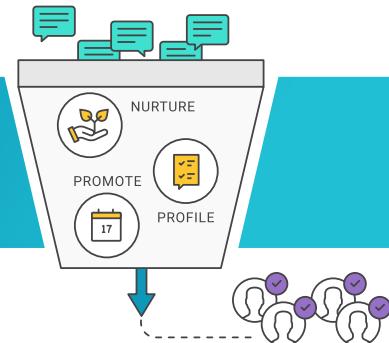
Business text messaging solutions empower marketing, sales, and support teams to create seamless conversations that deliver a personal touch. Thoughtful text messaging programs that follow best practices are a powerful way to attract, engage, win and retain customers.

Use this guide as a resource for examples of how you can leverage business text messaging for marketing, sales, and support.

Business Text Messaging Use Cases for Marketing

In today's world, marketing has a tough job. Markets are filled with noise, from emails to voicemails to social media and more. It's crucial that you get your audience to notice and pay attention to your insights and information. That's the challenge.

Business text messaging helps you cut through the clutter and get that first conversation, then deepen engagement to keep it going.



We have 70% response rate with this text messaging app.

- Randall Mills, Branch Manager, AmeriFirst Financial

Messaging Applications for Marketing

1. Start the Conversation and Build Your Lists

Creating SMS-based opt-in campaigns, in addition to collecting email addresses, is an effective way to build your lists and start conversing with 6x more prospects. By providing SMS as a channel to your audience, you can take advantage of the way most people prefer to converse, via text.

Here's how you can integrate SMS-based opt-ins into a marketing program:

- Provide a keyword in your marketing materials. Include a keyword in your banner ads, social media posts, print ads, posters, and even emails.
- A keyword is a simple word that someone texts to you, which then triggers an automated process, such as a compliance process to assure consent, or perhaps a nurture campaign specifically designed to cover the interest area represented by the keyword.
- For example, you can use general keywords such as INFO or FAQS for interested prospects to text to you to learn more about your company or products. Or use three different keywords to represent your three product lines, so you know which product information to send.

- After your prospect texts their keyword to opt-in to your campaign, your compliance automation should confirm consent, automatically create an audit trail and then capture and save all conversations and messages in that trail.
- By using different keywords, you can segment your SMS opt-in lists based on initial types of interest, as the beginning of your profiling process.

2. Profile Your Audience to Provide Personal & Relevant Messaging

Text messaging lets you gather specific and accurate insights about your audience. By asking simple questions that provide keyword responses, you immediately understand your prospects interest area to provide the most relevant content and offers. By asking more detailed questions over time, you build robust personas to deepen your understanding of, and engagement with, your prospects and customers.

Here are some pointers on where to start:

- **Start by asking simple questions that matter to your audience.** Start with the basics; how they want to communicate with you and their specific areas of interest.
- **Share insights to get more information.** You know that customers who buy a specific product often need help in three potential areas. Use those three areas as keywords to offer options that are highly relevant.
- **Show them you understand their world.** Offer a relevant set of keywords to answer a question. They'll recognize that you understand their needs.
- **Feed your analytics and profiles.** Using the right keywords makes it easy for prospects and customers to quickly respond, as you get the information you need to analyze responses and deepen your personal profiles.
- **Be thoughtful. Building relationships takes time.** Send 1-2 questions a month. Ask questions that matter to them.
- **Create stages of profiling.** Start with the basics to develop pertinent segments or personas. Develop profiling questions that relate to these specific personas, so you can deepen your insights in an even more relevant way.

3. Keep People Engaged and Stay Top-of-Mind

Can a relationship last if it's one way? Relationships deepen when both sides get to know each other better. It takes connected conversations to create the level of engagement needed to convert prospects into customers and keep them coming back for more.

Leveraging a single channel limits your possibilities, where a multi-channel approach to lead nurturing with messaging allows for more dynamic engagement.

Here's how you can get the engagement going with text messaging:

- Start with an opt-in campaign to make sure people consent to receive messages.
- For opt-ins, create a 3-4 message nurture on a hot topic. Offer a choice for content delivery, email or text. If they choose email, send a text to remind them of the email. For non opt-ins, continue email nurtures. Add text offers with keywords in emails to entice them to opt-in.
- Take advantage of your profiling insights from simple text keywords when deciding what content to send to whom. You can be sure your audience is interested in what you're sending.

4. Raise Awareness for Events and Promotions

Sometimes the message you're sending is time sensitive and needs to be short and sweet. Text messages are perfect for these situations.

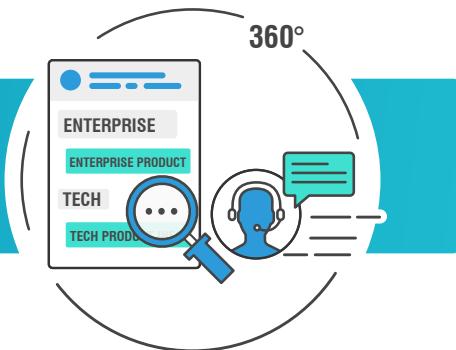
Here are some examples where quick, short SMS messages can be incredibly useful:

- **Events promotions.** Announce new events and provide access for people to sign up or purchase tickets. Then send reminders before the event and simple surveys afterward.
- **Sales.** If you have a special sale happening, you can announce it's happening beforehand, remind people when it starts, and let your audience know when it's ending.
- **New products or services.** Let your SMS opt-in audiences get the news first when a new product or service launches. You can also include a discount especially for your text messaging audience. This provides an incentive for people to stay opted in to your messaging campaigns.

Business Text Messaging Use Cases for Sales

Now more than ever, successful selling is dependent on creating and building trusted relationships with your prospects and customers.

Messaging gives your sales team a proven method of increasing both their number of conversations and the relevance of those conversations.



We were missing 58% of incoming calls.
Now we answer 80+% of all incoming enquiries.

- Ajaz Elahi, Director, Sinspeed

Messaging Applications for Sales

1. Increase Your Sales Team's Responsiveness

Research shows that 35-50% of sales go to the vendor that responds first.

Messaging will help your sales team be the first to respond and to continue to respond in a timely fashion.

- Immediately know when you have a new prospect.
- Automate the first response to acknowledge their request.
- Learn more about your prospect by asking a question about their interest, with keywords to respond.
- Immediately respond with relevant information based on their response.
- All before your rep gets involved with an interactive conversation.

2. 360-Degree Prospect View

One of the hardest jobs for a sales team is to learn as much as they can about their prospect, as quickly as they can.

Traditionally, the handoff of leads from marketing to sales has provided only very high-level insights about a prospect. With the right business messaging solutions, you can capture a depth of information by simply reviewing the complete 360° conversations, across marketing and sales.

You'll know every message that was sent, review all the automated messages and keyword responses to understand their specific interest areas and their responses, check to see what content they have received and understand exactly why they were moved to sales for outreach and conversation.

Other members of sales teams can easily cover in-process conversations and be immediately relevant thanks to the conversation history. Reps can review previous sales conversations to upsell or cross sell customers.

Everyone in your sales team is more informed.

3. Prioritizing Hot Prospects

Advanced business text messaging solutions give you the ability to prioritize prospects or accounts based on their status, behaviors or by creating a list of specific high-priority conversations.

- Reps get real-time alerts whenever a new message arrives.
- Custom lists let reps prioritize hot prospects, large accounts or other ways they want to filter their opportunities.
- Reps can also check specific campaigns, outreach and more to track and reply to key opportunity conversations.

4. Continuing Conversations with Stalled Prospects

Messaging gives you a communication channel that is widely read and drives more responses. So you can continue the conversation with your stalled prospects and a significant percentage of them will listen and respond.

Messaging helps with:

- Re-engaging dormant leads with simple, relevant insights and information.
- Showing insights into conversation history with stalled prospects to define what content might re-initiate their interest.

5. Simplifying Complex Processes

Some types of sales require more complicated contractual agreements that are dependent on progressive signatures and a diversity of documentation. For example, mortgage contracts and higher education applications. Advanced business text messaging lets you flexibly automate the reminders and updates that keep these document flows moving forward, without manual intervention.

Using messaging for a document workflow lets you:

- Define the process that you'd normally use to follow-up to confirm a contract or application, or any other paperwork you might need.
- Automate that process in a series of simple text messages. When your buyer responds with information (aka a signed document or approval keyword), the next step of the process will trigger and they'll receive a message confirming receipt. If a new piece of information is needed, a message will remind them of what's needed. If they ask a question, you'll be notified and can get personally involved.

Use Cases for Business Text Messaging in Support

Customers expect immediate responses from their support organizations. Vendors must quickly resolve customer issues, before customers become frustrated and start looking for other options.

Business text messaging for support organizations gives you the ability to respond quickly and resolve your customer's issues.



We respond to 10 support messages to every support email - and our customers love it.

- Greg Royse, CEO, Tidy

Messaging Applications for Support

1. Fast Response and Resolution

Responding quickly to a customer requesting support is a powerful way to soothe problem situations and show you care. Business text messaging empowers service organizations to do just that.

- Instant **text-to-case automations** create a case as soon as the inbound text request is received. The customer then is sent a confirmation and case number. This automation can be active 24 x 7.

- **Rules-based routing** matches your current support routing rules so messages are quickly routed to the appropriate support rep or team.
- Use automated messaging to drive simple **self-service responses** for commonly asked questions. Keywords are provided to a customer, who then responds. The appropriate information (a link to a help page) is then sent back, based on the keyword response. Support reps can seamlessly enter the conversation as needed.

2. 360-Degree Customer View for Your Entire Team

We all know that customers hate repeating themselves to different support reps throughout their service process. Business text messaging eliminates this issue.

- In-depth customer histories allow agents to dive into past cases for a certain customer and have the context they need to provide the best support possible.
- Having all the details of customer histories increases accuracy for efficient service resolution.
- Full visibility into case history creates transparency and accountability for support agents, no matter who receives the case.
- Team and Individual Rep Inboxes enable all reps to respond effectively to customers in real time.

3. Real-time Continuous Customer Updates

When customers are informed and up-to-date, they are more likely to trust that your support organization is effectively resolving their issue. Business text messaging makes it simple to continuously update your customers.

- Send them a message letting them know the status of their request whenever it changes. You can send messages when status changes or send them timed updates across a period of time.
- You can also automate updates around product news and tips, documentation updates, new product availability etc. to keep your customers informed.

4. Messaging Workflows for Support Processes

Advanced business text messaging solutions can map messaging processes to your standard support procedures.

- Support requests can be automatically routed based on your internal processes and procedures.
- Customer messages can be displayed for multiple agents in their messaging Inbox.

- Support requests can trigger automatic responses that follow your guidelines.

5. Send Content to Help Them Resolve Their Problem

Business text messaging can deliver a wide array of content types to your support customers. You can use messaging to deliver content, or you can trigger actions from other communication mediums through your CRM, based on message responses from customers.

Customizable Rapid Response Templates make it simple to pre-define common responses to common customer issues so that reps consistently and quickly reply with the best options.

6. Customer Quality of Support Surveys

Capturing feedback immediately after a customer experience gives you the best view into the quality of care you're delivering to your customers. Messaging makes that simple to do.

- Send a single message survey that lets them rate you, and/or comment on their current experience. You can automatically send this survey question when the case closes. Accommodate the type of satisfaction or rating that your company wants – for example, NPS, Satisfaction, or Effort score. You can also set a threshold for the scores that are acceptable, then send a series of follow up questions to customers who score below your threshold. Ask them about their experience, define their specific issues and offer a 1:1 conversation to remedy whatever issues they experienced. Your customer is happy and you gather critical insights for improving your support delivery.
- Send surveys at different points in time (as part of a workflow) or whenever you want (ad hoc and personal) to survey your customers for feedback on support, on their experience with your products, or anything else you'd like to know.
- All responses are included in the conversational history and stored in databases. Responses can be analyzed to find key trends that give you insights into what's working and what's not within your support organization.

7. Service Levels

Knowing exactly what service levels you're delivering gives you the insights you need to improve your customer experience. Business text messaging gives you valuable insights into service levels including:

- Recurring issues that are identified by survey responses.
- At-risk customer, based on low scores and the conversations that follow as you dive deeper into the issues with progressive surveys.
- Agent performance, based on individual, team and organizational survey scores.

SUMMARY

The benefits that business text messaging brings to marketing, sales and support are varied, and powerful. By implementing the advice in this guide you will:

- Help marketing teams cut through the clutter and get that first conversation, then deepen engagement to keep it going.
- Create a sales team with a proven method of increasing both their number of conversations and the relevance of those conversations.
- Give your support organizations the ability to respond quickly and resolve your customer's issues.

Want to see how text messaging can empower marketing, sales, and support teams?

Try Converse for free! Click here.

