



MARKETER'S GUIDE TO **OMNI CHANNEL** COMMUNICATIONS

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INTRODUCTION TO **OMNI CHANNEL** MARKETING

CHAPTER 1

INTRODUCTION

This guide was written to help marketers understand the emerging area of omni channel marketing communications. For marketers in the retail sector, omni channel marketing isn't new, but for the majority of marketers who are just hearing about omni, this guide brings together not just the concept of omni channel marketing, but the components as well. The principles in this ebook aren't new, letting people decide how they want to be contacted and about what topics is just good marketing practice, what omni opens up for marketing is the ability to have a single platform to manage and measure communications on a variety of media. The true promise of omni channel communications is being able to manage email, push, SMS, and other messaging platforms in a single place. Integrated communications. Integrated measurement. Integrated segmentation. These are the three pillars of omni channel marketing communications.

Usually with a book like this you start with the pieces of the puzzle then assemble them at the end. This approach works really well when it's clear how all the pieces fit or you're making a case for something new and revolutionary in the market. In our case we're starting with the end solution—omni channel communications—then covering all the parts that make the whole.

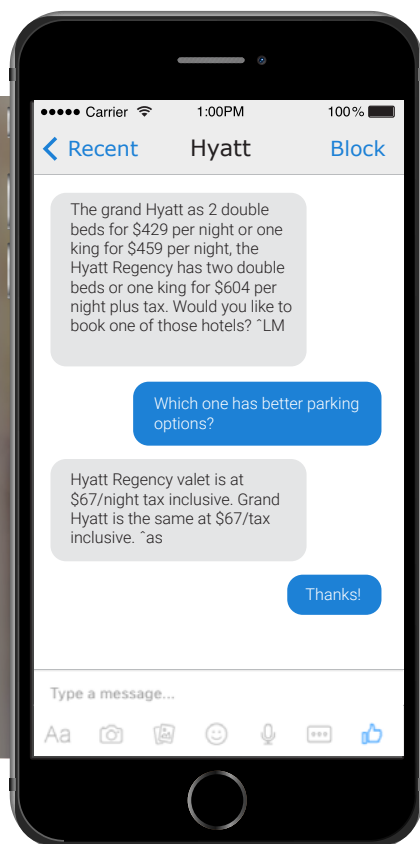
While this seems backwards, starting with the big picture gives you the whole vision for a new communications strategy at once. You won't just see how the parts fit together but why they fit together as well. Each facet of omni channel communications supports the other. 2-Way SMS is built on an SMS messaging API that powers 2-Factor Authentication that can be used to help customer support over the phone. That's the omni part of omni channel. All encompassing. Unified. Cohesive.

WHAT MAKES OMNI CHANNEL, OMNI?

Omni channel marketing communications is comprised of a web of solutions that gives customers the flexibility to choose the right communications tool for them—at that moment. With fully-integrated communications, it doesn't matter what channel a customer picks, companies can manage everything in a single place. Omni channel marketing stems from both consumer demand and technological innovations allowing formerly disparate communications channels to be melded together into a single channel.

Omni channel marketing is more than just a choice of platforms or channels, it's a mindset that there is no preferred channel for customer communications. It's a mindset that allows companies to think nothing of having a support call start with SMS, switch to email for details then phone to confirm and back to SMS for a follow up survey. At its core omni channel marketing is customer-focused and user-centric marketing and messaging. Omni channel is about letting the customer guide the pace of the conversation, not the company.

Omni channel marketing grew out of both the social media revolution and the explosion of smartphones. Social media brought the expectation that companies and brands are always available to answer questions and smartphones let us start those conversations anywhere, any time.



**+20X
INCREASE**

**IN MESSAGES
RECEIVED BY
HYATT WITHIN
~1 MONTH**

Hyatt

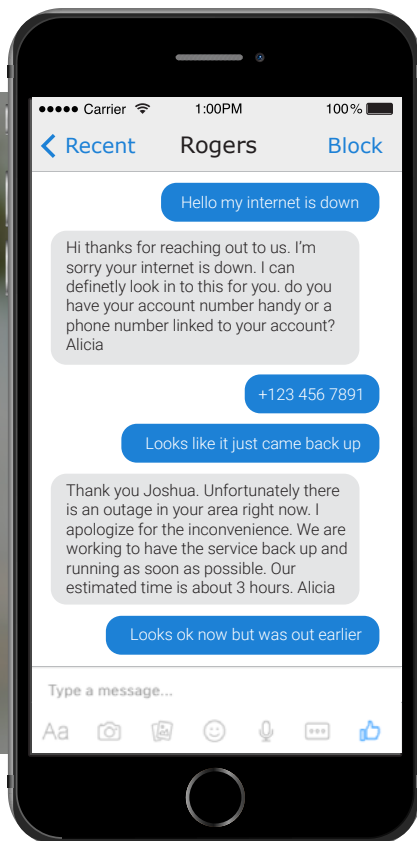
*Check Availability/ Reservations /
Order Room Service*

**Started Offering Customer Service
on Facebook Messenger in 11/15**

■ *Results of Offering Customer Service on Facebook Messenger*

CONSUMERS ARE DRIVING THE EVOLUTION OF MESSAGING

Consumers don't just expect responses from companies any more, they expect rapid responses. [According to a study by Lithium](#) over 40% of consumers expected an answer to their question within an hour. This expectation puts companies under pressure to constantly monitor and respond to queries, regardless of channel. Together with the expectation of a rapid response, consumers want to connect on the channels they choose. Social media, email, chat, phone, SMS these channels are all available to consumers, and they use every single one of them. This means a support question—a question that must be answered immediately—could come from a myriad of places, and you have to monitor all of them.



65%
INCREASE
IN CUSTOMER
SATISFACTION

65%
DECREASE
IN CUSTOMER
COMPLAINTS

**Rogers
Communications**

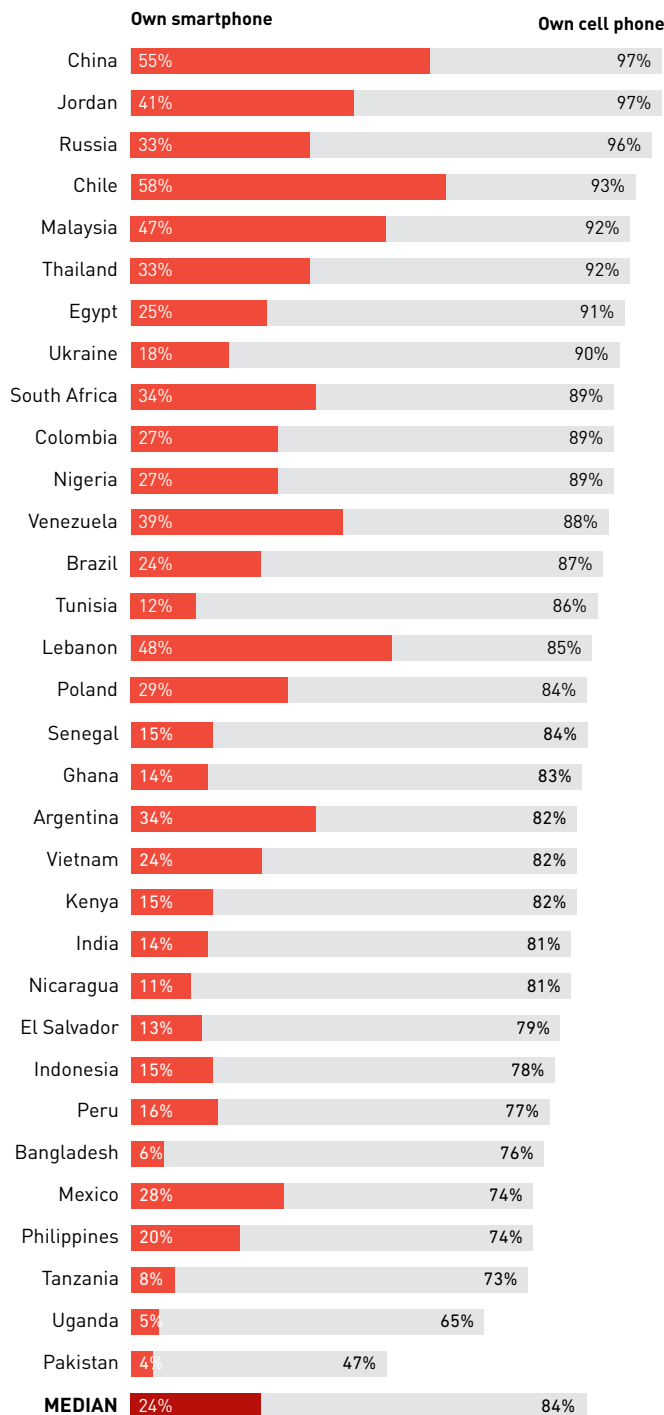
*Ask questions / Update Account /
Set Up New Plan*

**Started Offering Customer Service on
Facebook Messenger in 21/15**

■ *Results of Offering Customer Service on Facebook Messenger*

CELL PHONES COMMONPLACE; SMARTPHONE OWNERSHIP VARIES

Adults who:



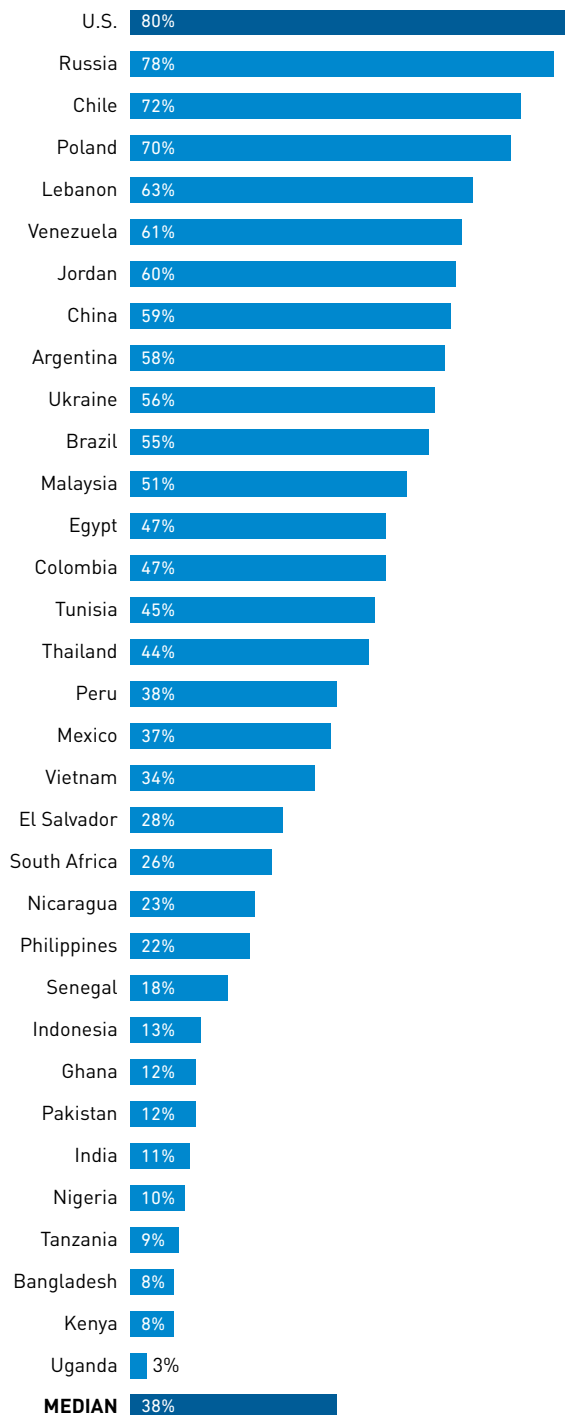
Note: Percentages based on total sample

Source: Spring 2014 Global Attitudes survey: Q67, Q68 & Q69

PEW REASEACH CENTER

GLOBAL COMPUTER OWNERSHIP

Adults who have a working computer in their household



Note: Percentages based on total sample.

Median Percentage excludes the U.S.

Source: Spring 2014 Global Attitudes survey: Q148e.

PEW REASEARCH CENTER

Omni channel marketing isn't just limited to messaging, but also the entire process of marketing to consumers. Let's take the travel industry, according to a [study from Facebook and Deloitte](#) most consumers use several devices (and often several devices as once) to plan a trip. For a resort, an airline, a hotel, this means that each time a consumer interacts with their brand it has to be not just seamless but consistent across devices and platforms too. Jumping from laptop to smartphone to tablet, consumers expect—and will soon demand—their searches and favorites come along for the ride.

From messaging to marketing to customer experience, omni channel messaging is only going to gain ground and become more complicated to manage. Bot-connected chat apps, like Facebook Messenger and Slack, will create a whole new facet in the omni channel world—and that world is going to get a lot more interesting in the next 6-12 months.

OMNI-CHANNEL MESSAGING BRINGS REACH AND FLEXIBILITY TO YOUR MARKETING COMMUNICATIONS MIX

Having one way to communicate with customers is like having only one flavor of ice cream. Sure it's good, but you're not always in the mood for mint chocolate chip. Sometimes you need rapid, reliable communications and only SMS will get the message to customers quickly. Product updates, probably better as an email. Support could be done on either, but what about using WhatsApp or Facebook Messenger? Omni channel marketing—and by extension omni channel messaging—is about being flexible and adaptable to both your customer's needs and wants.

While there is a downside of being platform agnostic, the upside is not needing to shoehorn your message into a format that doesn't fit. A newsletter over SMS makes no sense, but a 2FA OTP (one-time-pin) is better not emailed.

OMNI CHANNEL MARKETING CHANNELS AND HOW THEY FIT INTO MARKETING COMMUNICATIONS

WEB



The fundamental cornerstone of omni channel marketing and communications is the humble website. Your website sets the tone and story for your company. All channels should feed into and be derived from your website. While it seems obvious, in practice many marketers forget to do things as simple as an email subscription form on the site. Or asking how someone wants to be contacted and making sure everything from the newsletter list to the CRM reflect that choice.

Your website, and offshoots from it, serves as the landing page for support. It becomes the place to download your app. It's the first impression and point of contact for potential, new, and existing customers. Your website should allow any visitor to contact you by phone, email, or SMS. Push notifications should offer quick taps to reach the website if something is unclear.

Your website is your digital hub and all other media emanates from it.

EMAIL



If your website is the cornerstone, email is the foundation. Email is the well-accepted (though often maligned) communications tool of choice for much of the world. When people want to reach you, voice and email are the two leading contenders. While email is ubiquitous, email is a problem because people receive so many emails a day—not to mention spam—that important messages are often lost in the shuffle of overstuffed inboxes. The solution is neither to abandon email nor blithely ignore its weaknesses. Leverage email for bulk communications, support, and outreach; knowing full well that many of the people you are trying to reach might not be seeing your message at all. This works as long as email isn't your only weapon in your marketing toolkit.

One of the most important parts of this facet of omni channel marketing, is making sure your email campaigns are connected to all your global systems. Emails to support, should be managed by the same tool as calls to support. Email conversations with leads and qualified customers need to be in the CRM. When other communications channels break down, email needs to be a key fall back.

VOICE



Voice plays a unique, and changing, role in omni channel communications.

Not long ago voice was essential to support and customer connections, today voice is the fall back when even email fails. Its reliability gives it a place in 2FA and authentication with email to voice and SMS to voice tools that are the last resort if messages aren't getting through. But is voice for marketing dead?

No, not hardly, but its place has changed in the last few years as a bridge between the online world and offline.

SMS



SMS isn't the newest channel on the list (that honor goes to push) or the oldest (voice), but SMS is more than a way for a people to send short messages back and forth to each other. Through messaging APIs, companies can send 2-Way SMS messages that integrate with other backend systems like orders and shipping. SMS for support. SMS for shopping. SMS for booking appointments. SMS for communicating and connecting with customers.

Like all of the omni facets, for SMS to be an effective omni channel communications tool, it must be connected to all the other tools. With a tap, you should be able to switch from SMS to email when you need more than 160 characters to explain something. It's amazing how much can be said in 160 characters, but sometimes you need to be able to jump to email or phone to wrap the conversation up efficiently.

CHAT



Apple's iMessage looks like SMS. In many ways it behaves like SMS, but iMessage is far more complex than any SMS. While iMessage is also the iOS SMS tool, when users see those blue chat bubbles, iMessage is working as an Over the Top (OTT) messaging tool. Chat and the rise of semi-intelligent chat bots (like the recent [Messinabot](#)) are new and exciting avenues for messaging. Combining the natural communication flow of chat, the ease of SMS, and the power of enterprise messaging APIs, chat bots and chat-connected services will help marketers jump from an SMS or email right to a full discussion that could resolve a support issue, place an order, or continue a pre-sales conversation.

WHAT IS A BOT

A chat bot is simple a program that runs within a chat application like Whatsapp or Slack that can answer questions, give answers, and ask questions of its own. Some chat bots are semi-artificially intelligent and can learn as they deal with people, others just have a rote set of commands and responses.

Chat bots aren't new by any means, but what is how intelligent chat bots have become and the number of places you can interact with them. Very soon you could place orders or get customer support entirely using an AI chat bot that you might not be able to tell if it's a bot or a person.

The Bot Revolution is just beginning, but both Facebook and Slack are investing heavily in the chat bot space making this one of the hot areas for marketers and developers to watch ([Chris Messina dubbed 2016 the year of conversational commerce](#)).

PUSH



Push might be the newcomer in this suite of communications tools, but with smartphones in billions of hands around the world, sending push notifications through your app will get your customers' attention. Unlike voice and SMS, push messages are specific to an app and are limited by the mobile OS. Push messages draw the user's attention from another task to your app. This could be an order update, support notice, or a promotion. Push messages are designed to catch people's attention, because they can be interactive, can connect to SMS, email, or voice for a call to action.

OMNI CHANNEL EXAMPLES

Below are a few examples how omni channel messaging fits into marketing and communications. In all of these examples, the point is how several messaging platforms mesh together into a cohesive whole.

1 SUPPORT: EMAIL, PHONE, SMS, AND PUSH

Often customer support relies on their phone and email for all communications. Many companies tie both channels into tools like Zendesk, but sometimes support is handled more ad hoc.

However, more companies have realized that sometimes neither phone nor email is the best way to support customers. Crowdsourced car pool app, [Scoop saw SMS-based support as the only way to give their riders and drivers timely updates](#). Sometimes using the phone isn't convenient and emails often get delayed or lost. Critical communications like emergency service outages or changes need to get right in front of customers. Using push notifications and SMS messages avoid inbox delays and get messages right when people need them most. Even pure support is less complicated over SMS. With limited space to write, both customers and agents need to be concise and get right to the problem at hand.

Scoop connects people to carpool together for work, this means people will always be worried about getting to work or home. A rider might need to find out where their ride is and "Where is my ride?" does the job. A driver might have hit traffic and could ask another passenger to text "Stuck in traffic, will be 15 mins late" to go out to the other riders on the route. In Scoop's case they made sure that all messages (email and SMS) and phone calls were logged and connected in Zendesk so all agents had the same information at the same time.

For omni channel support, it's not enough to say "Text us for help", you must make sure that all support requests are received, logged, and managed the same way. Without integration, omni channel support will quickly become an omni channel disaster.

2 STORE LOYALTY: PROMOTIONS AND COUPONS

SMS is a proven way to send out coupons to customers. Emails can be misplaced (spam) and webpages forgotten, but SMS messages still have the highest open and delivery rates of any messaging tool. You don't have to just choose one or another: email or SMS for any promotion. Some customers prefer email. Others like text. Giving customers a range of options even options like "text me this coupon" in an email newsletter expands how customers can connect with you.

Like support, integration and coordination is essential. Both email and SMS coupons need to be accepted at stores. The same offer has to be available regardless of how customers want to receive it—even if it's printing off a coupon from a website. Omni-channel needs to give you more reach with customers, not more headaches connecting with them.

3 SMS TO CHAT BOT

As we talked about above, one of the newest things to hit omni channel communications are chat bots. Through SMS or OTT chat apps like Facebook Messenger, Slack, or Whatsapp, [these bots are growing in popularity with businesses and consumers](#). Helping people with everything from basic account questions, password resets, or simple support questions, chat bots free human support agents to answer more complicated questions. The chat bot revolution is even extending to [people having their own chat bots to answer questions and get freelance jobs](#). At first chat bots were limited to just chat apps, but new messaging APIs are changing that. Soon SMS, OTT, and web chat will be connected with chat bots.

Chat bots will soon be commonplace and help customers place regular orders, refill prescriptions, and manage their day to day work. Until then, chat bots connected to SMS or OTT apps are an innovative way for companies to not only reach customers, but support them more efficiently as well.

These are just a few examples of how omni channel marketing communications are changing how we connect, market, sell, and buy today. None of these technologies alone are revolutionary, but together they are making an evolutionary leap forward in communications and customer engagement.

WHERE DO WE BEGIN

With the whole omni picture in mind, we're going to take a step back and start looking at the pieces of the puzzle. The first is a fundamental part of how omni channel communications work: Application to Person messaging APIs.

MARKETER'S GUIDE TO **MESSAGING APIs**

CHAPTER 2

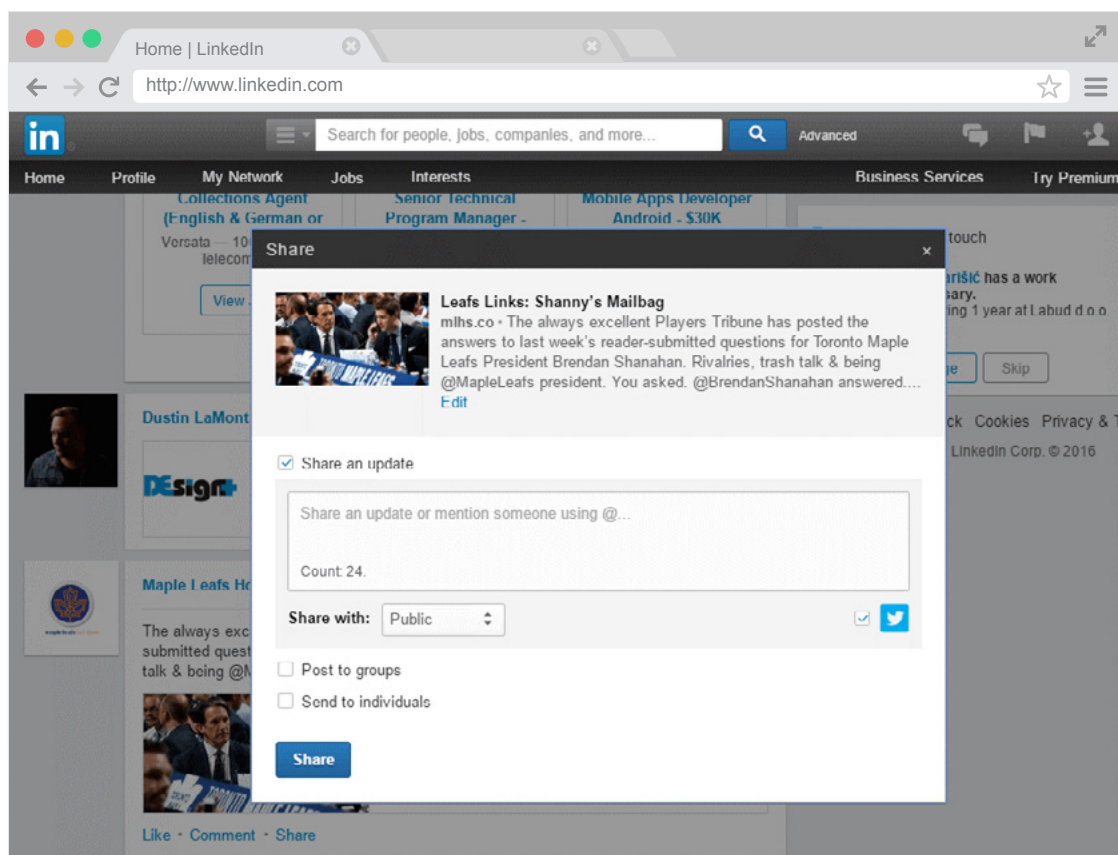
CONNECTING CUSTOMERS TO YOUR APPLICATIONS WITH SMS AND MORE.

If Omni-channel Communications is the goal, the wrapper that holds all of this together, then [Application-to-Person \(A2P\) messaging APIs](#) are the foundation. When developers start talking about APIs (the API doesn't support this this, I have a hack for that API...) a lot of marketers start getting a little shaky. It's easy to get confused about what any API does much less what an A2P messaging API does.

The good news is that none of this is complicated and we'll put this piece of the puzzle together for you so we can start talking about putting other omni channel tools into action.

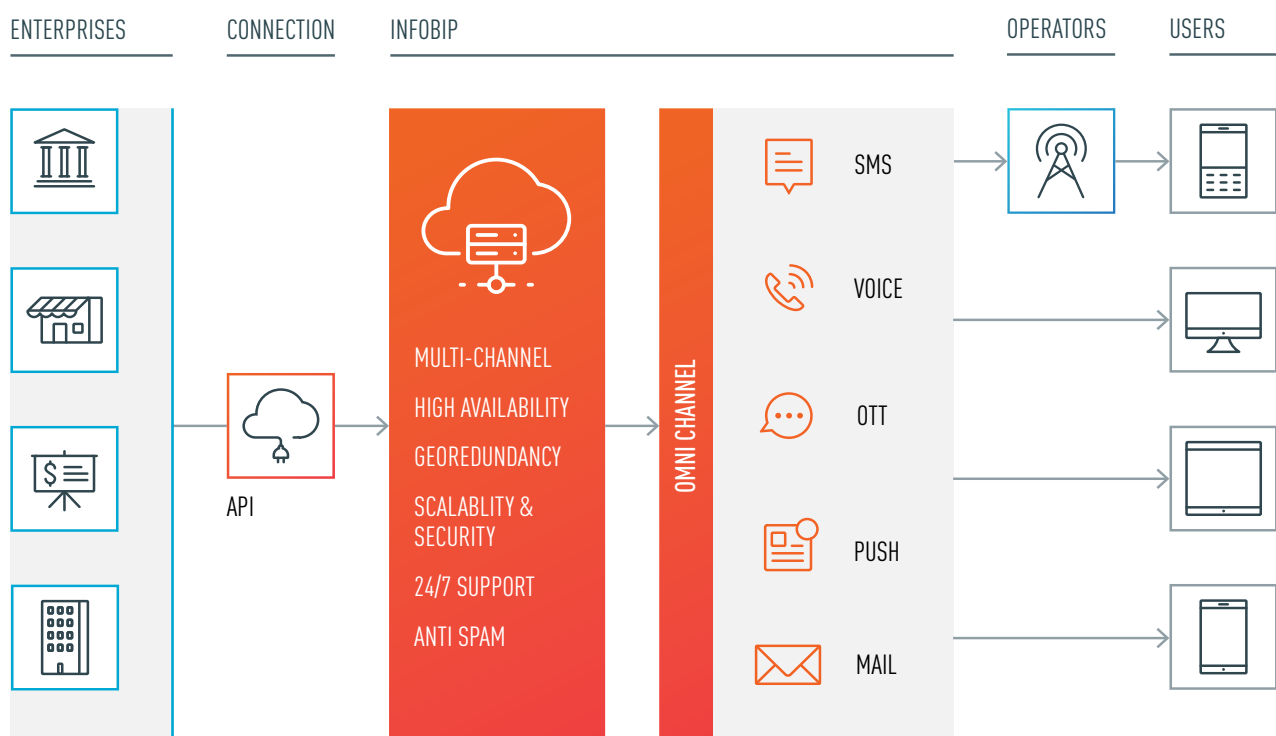
WHAT IS AN A2P API AND WHAT DO I DO WITH IT?

Let's start with APIs first. API stands for Application Programming Interface and is just a set of instructions that developers use for one program to talk to another. For example when you share a post on LinkedIn and check the Twitter box to tweet your share as well:



LinkedIn is using the Twitter API to make that happen. Developers use all kinds of APIs to connect different apps together to create the apps we use today. APIs generally support a few of the main programming languages, but that isn't (usually) something marketers need to worry about it. APIs are instructions to connect applications to do stuff and work together. Cool.

The Application-to-Person (A2P) part is an API that lets an application (let's say the computers at your bank or an airline booking system) send messages to a person (like you) over email, SMS, phone, or even to an app as a push notification. If your bank wants to let you know you've received a deposit, they would use an A2P API to create the email and send it to you. If there is a gate change for your flight, an A2P API would create the SMS to be sent to you. Businesses use A2P APIs in many of different ways. What separates messaging APIs is how many different kinds of messages you can send with it. Some might only do email. Some might only be used for calling and voice commands (the eponymous "press 1 for accounts, press 2 for billing, press 3 and listen to our hold music forever..."). Others connect a host of different communications tools together so one internal system (say the shipping part of an eCommerce system) can send out emails, SMS, voice, or whatever else a customer might want.

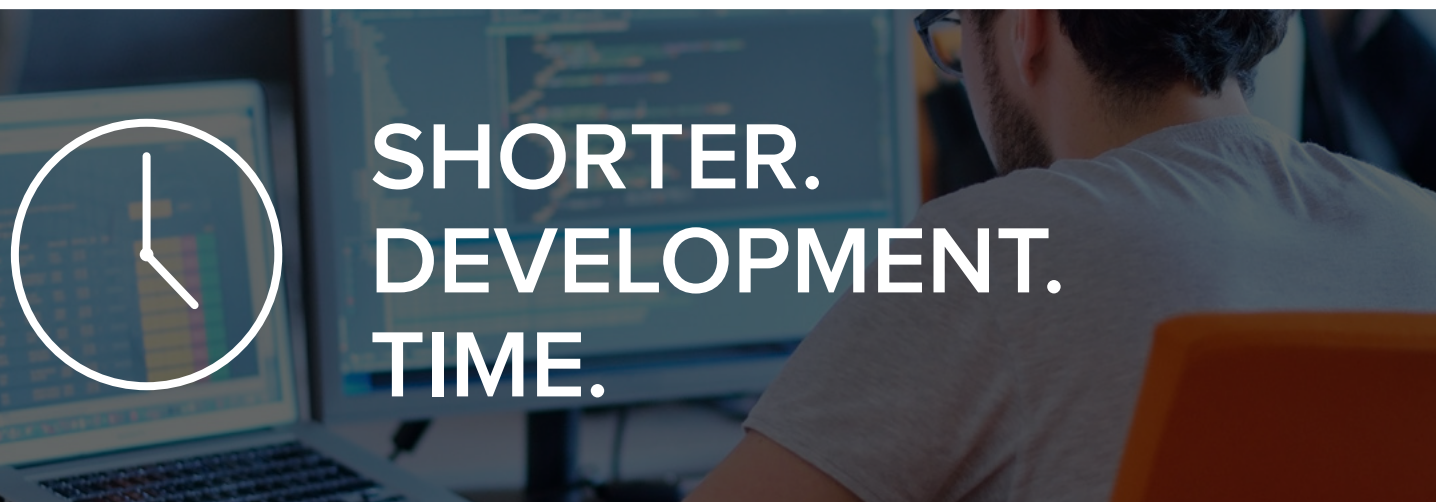


For example, you bought something online. You get the receipt for your purchase via email, the store's mobile app pops up a notification when your item ships, and you get an SMS with the tracking number for your package. Three different messages sent from the same system through one A2P API.

For a marketer, if your internal systems are connected to a good A2P API, then you have a lot of options for sending your customers more information, in more different ways, and you can leave which medium they want to use (mostly) up to them. Newsletters don't make sense over SMS, but shipping and billing notifications could be email or SMS. Customer support can start (or finish) with an email, a phone call, or request through your app. When you're something more powerful than just an SMS API, the question changes from what can I do to wow what am I going to do first.

WHAT MAKES A GOOD A2P MESSAGING API?

Without getting into a developer-centric discussion, a [good API is flexible, well documented](#), can be used with a range of programming languages, and can scale from 100 to 1,000,000,000 messages without recoding your app. But what does that really mean? Why should I care if an API is good or not? Three words.



Good APIs tend to be easier to implement and integrate into your systems. Easier is good.

Good APIs have documentation on sites like [Programmable Web](#) and services like IFTTT and [Zapier](#) so it's easier for developers to develop applications and see examples how the API works with other apps.

Since APIs are the foundation for apps, the glue that sticks them together, and the bridges between apps, the better APIs are, the better they are to build with. If you think of APIs in terms of building blocks, glue, and bridges, it's easier to see how APIs fit in with your marketing tools.

HOW DOES THIS FIT WITHIN OMNI CHANNEL COMMUNICATIONS?

When you take an A2P API and connect it with your CRM, support ticketing systems, marketing automation system, newsletters, mobile app, and website you have an omni channel marketing engine. It's the power and flexibility of the API that allows your customers to send an SMS to get support or let you run a coupon promotion from your app and website or offer updates over email or PIN for 2FA via SMS or voice, all of that is powered by the messaging API.

Without A2P APIs we couldn't build most of today's apps. APIs allow developers to write one (very complex) thing, like how to connect to an SMS gateway using the API, and reuse it over and over again. Without APIs developers would have to write these connections themselves each and every time.

HOW DO I GET STARTED?

Integrating an A2P API into your app or infrastructure might be a developer's job, but before the project reaches your developers, you have to decide what you want to do. A2P is about engaging your customers in new and dynamic ways. Consumers want a say in how they are contacted. Messaging APIs are the way to get there.

But there's a catch. To be effective you not only need a solid API that connects to email, SMS, voice, and push, you need global scale and coverage to offer all messaging options around the world. Without global scale and coverage, you aren't truly offering a new customer engagement solution. You're, in effect, saying some customers in some parts of the world are more important than others.

No customer wants to feel unimportant when they can't send an SMS to you from their country. Make sure all of your customers feel connected and important.

MARKETER'S GUIDE TO **SMS** - PART 1

TECHNICAL DETAILS

CHAPTER 3

SMS IS NOT JUST ABOUT SENDING A LOT OF MESSAGES

Now we delve into one of the pillars of messaging and communications: SMS. SMS has an interesting place in our messaging world. It's become so pervasive, so omnipresent in our culture, it's easy to forget that SMS as we know it today is only a couple decades old. SMS is a fast and easy way to communicate with any mobile phone on the planet (all 7 billion+ of them). From simple chats with friends to financial transactions, SMS has come a long way from the first SMS (which said "[Merry Christmas](#)" if you're curious).

In this chapter we're going to cover more of the technical details of how SMS works and fits into marketing communications. Like the Marketer's Guide to Messaging APIs, the technical detail is intended to give you a solid foundation on how SMS works.

TL;DR: WHAT IS SMS?

SMS stands for Short Message Service and was developed in the late 1980s for the new mobile phones that were just coming onto the market. The first SMS was sent in 1992 on the Vodafone network. Because SMS messages can only contain 160 characters they use a very tiny amount of data so SMS is a reliable way to send and receive messages when voice and data networks are under extreme strain. Which is why SMS is recommended during natural disasters and makes SMS perfect for sending messages that you want to make sure people see and read.



Basic SMS messages can contain only text, numbers, and a few select special characters. Later services like MMS (Multimedia Messaging Service) allowed people to attach images and other multimedia content to text messages. MMS is often grouped in with SMS, but really it's a completely different set of technologies.

HISTORY OF SMS

1985	First proposal for SMS unveiled
December 3, 1992	First message sent
1993	First consumer SMS offering (Finland)
1994	Nokia 2110 first phone to make sending SMS messages easy
1995	0.4 messages sent/GSM customer/month
Christmas Day 2006	205 million messages sent in the UK alone
2010	1.6 trillion SMS messages were sent that year. That equals 193,000 messages per second.
2015	Cost of an SMS in Australia calculated at \$0.00016/SMS
2016	A2P messaging volume growing at 4% per year

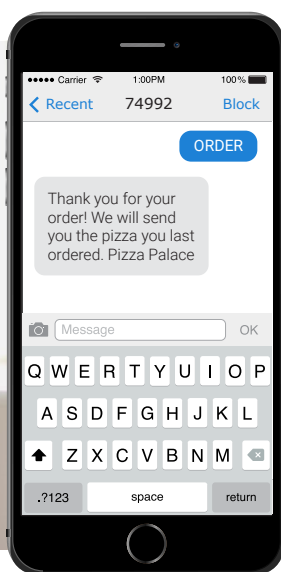
Source [Wikipedia](#)

Since its creation, SMS has excelled at rapid, concise communications. Its simplicity is what keeps SMS as a leading communication technology. People use SMS for personal messages, alerts, updates, and marketing messages like [loyalty programs](#). From teenagers texting to today's banking and transactional 2-Way A2P messaging, [SMS has forever changed how we communicate with peers and companies](#).

SHORT CODES, LONG CODES, AND KEYWORDS

Long codes are what we think of as our phone number, for example in North America a 10 digit number starting with your area code. Long codes typically were connected to a single phone or person, but now a long code can be virtual and connected to apps like banking, parking, and shopping. Long codes aren't the preferred way to connect people to apps (as in [A2P APIs](#)) for a variety of reasons from ease of use to control over spam to operators ensuring quality of service to customers.

On the other hand short codes are only 4-6 digits long and are used as a shortcut to connect people to applications.



For example “Text ORDER to 74992 and Pizza Palace will send you the pizza you last ordered” uses the short code 74992 to send your order to the pizza order system.

While long codes work regardless of carrier (a person on one carrier can't have the same phone number as a person on another carrier, even in a different country), short codes are carrier specific. For the same short code to work on all carriers in a given country, the same short code must be reserved on all of the carriers. The more carriers a country has, the harder it is to get a specific short code that you'd like. In the example above 74992 spells “pizza”, that code might not be available on all the carriers you want to cover, and only in the US. If that short code isn't available on all your local carriers; it's back to the drawing board for your short code campaign. Your provider should reserve and coordinate getting short codes for all the carriers in your region. The best service providers have built relationships with providers to know how to efficiently navigate each carrier's own procedures and rules. Without a good service provider, navigating the world of short code reservation could be very frustrating indeed.

Not only are the carriers different in different countries, the rules are different in countries as well. Short codes are generally registered to a company or business so there is accountability for what is sent and a person to bill for the messages. The next part of using a short code is allowing people send messages to the number and then have the application on the other end do something. The messages a person sends to a short code are called keywords.

Keywords are, like in the example above, a word that you can send to a number (usually a short code, but not always) for another thing to happen. Texting your bank's mobile banking short code with "ACCOUNT BALANCE" or "PAY BILLS" will give you a response or ask for more information. ACCOUNT BALANCE might just return your balance, PAY BILLS would probably ask who to pay and how much. The interaction between keywords and your bank (or the pizza place) is powered by A2P 2-Way SMS.

The most important thing to know about long and short codes are the regulations that each country (and mobile operator) have surrounding how they are used and managed. This topic gets into details that are beyond the scope of this chapter, but for now you need to know that many countries require marketing messages to use short codes and this is something your communications provider will help you with.

Speaking of commercial messages, for marketing's sake we tend to group messages into two groups: commercial and transactional. Each kind of message not only has a different use case, but in many places have different rules to follow.

COMMERCIAL MESSAGES MAKE OFFERS

At its most simple definition, a commercial message makes an offer to a new or existing customer. From "Show this message to get a free muffin with your coffee" to product promotions or anything else you can sell, those are all commercial messages. One of the most important parts of sending commercial messages is that you must have consent to send the message to someone. In virtually all jurisdictions mass spamming messages to people's phones is against the law. Companies can be fined thousands of dollars per message for spamming people. American pizza chain [Papa John's faced fines of more than \\$250 million for spamming people with messages](#). Often countries start Do Not Call (DNC) lists that allow people to opt out from any commercial messages by default. Of course if a person gives you specific permission to send a message, that's okay, but the point of DNC lists to protect consumers from spam and scams and give regulators ways to punish offenders.

Even with a person's consent to send messages, in many countries you have to make sure you send messages only between certain times. Usually sending between 9 AM and 9 PM is okay (day time and work hours), but sending commercial messages at night, weekends, or holidays is often restricted or prohibited. Rules vary from country to country, so it's essential to work with an SMS messaging provider who knows all the rules and laws around the world to stay out of trouble.

Scary legal stuff aside, if you have permission to send customers offers, [SMS is a very effective way to get your offers in front of eyeballs. Time and again, studies show that SMS messages are opened, read, and acted on more than emails or other types of communications.](#) An SMS gets people's attention and that is half the battle in marketing.

TRANSACTIONAL MESSAGES INFORM CUSTOMERS

Transactional messages aren't heavily regulated because

- a the customer asks for the information (bank balance, order status, package tracking) and
- b is already in an ongoing business relationship with you.

If you are a bank and a customer asks for their balance or to pay bills, those are transactional messages. If you send the customer an offer for a new credit card, that's a commercial message even though the person is already a customer.

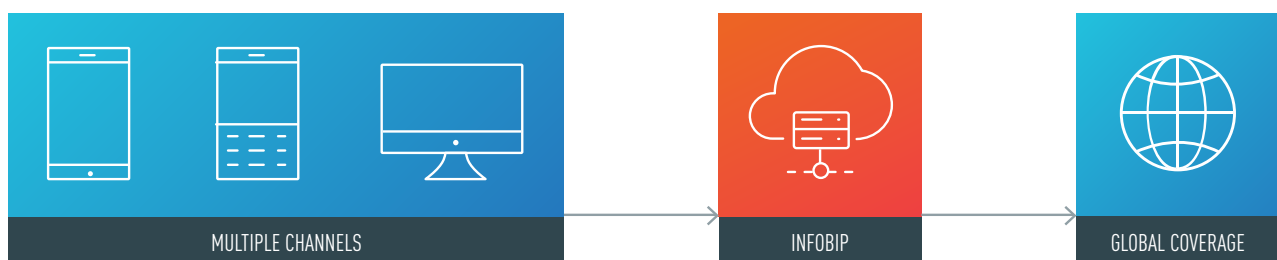
Transactional messages are a great way to connect and engage with customers during the buying process and during support calls. Every transactional message is an opportunity to understand and help your customer. Don't think of transactional messages as just fact-giving. These are people you're connecting and communicating with. Answer the question sure, but then offer a link to a mobile survey for feedback or something that helps engage your customers.

It gets a little grey if you make an offer in the same conversation as a transaction (like offering a coupon for someone's next order when they are checking on an order's status), but by and large transactional messages do not have the same regulations that commercial messages do (like the time of day restrictions).

2-WAY SMS CONNECTS AND COMMUNICATES

On the Infobip blog we've covered how [2-Way SMS is a powerful tool to build customer loyalty](#) and [tips on launching 2-Way SMS campaigns anywhere in the world](#), but we didn't get into details of how 2-Way SMS works. From the chapter on Messaging APIs, you know that APIs are essential to how 2-Way SMS works. Messaging APIs enables your app communicate to your users—it uses the power of the communications platform to connect people with your app. Here's how 2-Way SMS fits into omni channel communications..

Two-way SMS has both technical (sending the messages) and administrative (agreements with service providers, MNOs, and regulators) hurdles to overcome. From the administrative side you need to register short codes and get agreements with all of the MNOs in your region (and if you want to support multiple regions, all those MNOs as well) and have contracts in place with a provider to help you send the SMS to customers. Typically, when you work with a reputable provider, they handle getting short codes and agreements set up for you. It's essential that your provider knows not just the technical side of 2-Way SMS, but the administrative side as well. It's the administrative side that can get companies in trouble and lead to fines and messages being blocked.



On the technical side, 2-Way SMS needs to ensure that when customers send a keyword to a short code (remember above) that those messages get through to the system correctly and if a reply is needed, it gets back to the right person. It sounds simple when if you think about sending one message between something like an appointment booking system and a patient, but 2-Way SMS rarely means having one conversation back and forth. Usually you have hundreds or thousands of messages going back and forth between customers and your backend systems. All those messages have to be managed, routed, and replied to correctly—even when those messages happen minutes, hours, or days apart (like a support request). Your service provider's 2-Way SMS system is the key to making sure all of these parts work and sync together. Because 2-Way SMS is so complicated, and takes special agreements with MNOs in each region, most providers can only support 2-Way SMS in a few places. Providers with the most direct connections to operators and the most agreements in place can offer 2-Way SMS in dozens of countries. If you want to reach consumers on a global scale, launch worldwide 2-Way SMS campaigns and initiatives, it's important to check if your provider can help you in more than one region in the world.

FUTURE OF SMS IS INTEGRATION

SMS might seem simple and straightforward when we use it to chat with friends (or even for two factor authentication or transactions), but the reality is SMS messaging technologies are made up of a complex set of communications tools. Even when you do manage the infrastructure, like Infobip does, there are hundreds of details that can cause your SMS campaign to go sideways.

Still, this doesn't answer the question about the future of SMS and how SMS fits into the larger messaging and communications world.

The most interesting thing about SMS today isn't where it's been, but where it's going. Originally, SMS was designed as an easy way to send short messages between two people—and SMS has certainly excelled at that. At the same time as SMS was coming to the fore as a communications medium between individuals, email was cementing its position in the work world for collaboration.



**BUT THAT DIDN'T
LAST LONG.**

As people used email more and more, [the backlash against email as the dominant communications tool for everything grew](#). In the midst of this backlash companies designed ways for applications to start sending SMS messages instead of emails to customers. Like the first SMS (Merry Christmas), the first A2P message that Infobip sent was a holiday greeting to the people of Vodnjan, Croatia. With that came the era of SMS 2.0: the birth of A2P messaging.

SMS fills an essential role in marketing communications. When you want to make sure someone sees your message or confirm a mobile device or enable Two Factor Authentication (2FA), SMS is one of the best ways to get the job done. SMS won't replace email for newsletters and other rich content, but dominates SMS the short, concise, and urgent messaging space. Perhaps the most important part to consider when thinking about SMS for marketing communications is that none of the facets of omni channel communications (SMS, email, push, chat apps, and voice) are mutually exclusive. The most effective marketing communications strategies leverage the strengths of SMS and email and push and chat and voice to reach and engage customers most effectively.

MARKETER'S GUIDE TO **SMS** - PART 2

BEST PRACTICES AND TIPS

CHAPTER 4

THERE IS A RIGHT WAY, A WRONG WAY, AND A REALLY WRONG WAY TO DO SMS MARKETING

With the technical aspects of SMS messaging covered, let's talk about best practices. Like any marketing tactic there are good, bad, and really bad ways to use SMS for marketing. This post has pulled together some of the tips from experts on SMS marketing to help guide you on the path to good SMS marketing and avoiding getting into trouble.

The first and most important part, and the number one way marketers can get into trouble with SMS campaigns, is not getting informed consent.

CONSENT IS CRITICAL

Every blog post, ebook, and whitepaper on SMS marketing starts with this absolutely critical step. Get fully informed consent from people signing up for your messages. You need to make sure customers/consumers know:

- Messaging or data rates may apply
- How often you'll be sending messages (how many times a day and if the frequency can be changed)
- When you'll be sending messages (time of day)
- What kinds of content you'll be sending (and if they can choose different content)
- How to opt-out from receiving messages

In virtually all countries, consumers must opt into commercial messages and it is up to you to get consent and maintain a record of consent. It's a good idea to periodically check in with customers and make sure they still want to receive your messages too. The consequences of not getting consent and spamming consumers can include steep fines or being banned from sending future messages. It pays to be upfront with people when opt into your SMS campaign. No one likes surprises and if you give people as much information as possible at the start, the more likely they are to want to keep receiving your messages.

ALWAYS ADD VALUE

Once you have consent, now you need to make sure every message you send has some value to your customer. Someone signed up for your messages because they thought they would get something out of receiving them. Whether it's information, coupons, discounts, exciting offers, or something else. You have their attention; now you need to keep it and don't waste it.

One easy way to make sure your messages are always on target is letting people tailor the messages they receive. Some easy things you can do are:

- Let people choose how many messages to receive a day and when they'd like to receive them. Maybe someone only wants one message in the morning or maybe for alerts they want to receive the message right away.
- Let people choose what kinds of messages to receive. Maybe people only want coupons. Maybe they want product news.



Giving people a choice puts them in control which makes it more likely they will keep wanting your messages. If you make the all or nothing choice, nothing might seem like a really good idea.

KEEP IT SHORT

An SMS can be 160 characters (not words, characters) and if you include unsubscribe instructions in every message, that leaves maybe 140-150 characters to work with. You can say a lot in 140 or 150 characters, just look at Twitter where tweets are 140 characters, but you have to be smart about what you say. Don't try to abbreviate too much (standard abbreviations like Fri for Friday are okay). With some very rare exceptions, brands can't get away with using SMS or Twitter slang to shorten their messages. So when UR sending a msg 2 some1, use words. Long messages can be broken up into two (or more) messages, but use this with caution. Mobile devices might have bigger screens now compared to when SMS was born, but most still people aren't expecting to read a long message via SMS. When you can't fit everything into a single message, it's time think about a landing page. Landing pages don't just give you more space to work with for your message they can also be used for downloads, installing apps, and coupons.

MAKE LANDING PAGES MOBILE FRIENDLY

You'd think this would be common sense, but I've lost count of the number of links I get on my mobile device (emails, SMS, and push) that go to landing pages that don't work on mobile devices. This is a careless oversight that will cost you customers. It's very simple today to make mobile-optimized landing pages, so when you create a campaign you need to make sure to create a responsive landing page that works for mobile. And if your campaign is primarily done with SMS, this is doubly important. If you're looking for help with landing pages or optimizing your landing pages for mobile users, [check out the Unbounce blog](#) for all the information you need to get going.



GET THE TIMING RIGHT

When and how often to send messages is tricky. There are no hard and fast rules for how often (once a day, a few times a week, or more, or less) to send messages, but what we do know is that if you send too many messages, people will get annoyed and unsubscribe. If you send messages too infrequently, then people might forget about you between messages (maybe that's okay though). The best way to know is to consider how often the information is going to be useful. If you're sending a weekly coupon to loyal customers, then once a week would be the right time. If you are letting people know about last minute sales or offers, those could come more frequently, but it's important to measure the drop off as you increase the number of messages you send.



**THERE WILL BE A
MAGIC NUMBER
FOR YOUR
AUDIENCE —
WATCH FOR IT.**

There will be a magic number for your audience, you just have to make sure you're watching for it.

If you have a time-sensitive offer or coupon, make sure you send the message so people have enough time to react. Sending a great lunch deal just after noon won't help you get more customers, but sending it at 11:00 or 11:30 might catch people just as they are thinking "hey I wonder where I should go for lunch...". Timing is everything in marketing. You have to find that perfect time when people are most receptive and most likely to make a buying decision.

This is also a good time to remind you about SMS regulations around the world. In countries like India and France, you can't send commercial messages—even if you have permission—to people from evening until the next morning. While France and India have made specific regulations about when you can send messages, avoid sending marketing messages in the middle of the night or early in the morning. No one likes to be woken up by their phone buzzing in the middle of the night, and if the message that woke them up is a marketing message, you could lose a subscriber (best case) or get reported as a spammer (bad).

MAKE SAYING GOODBYE EASY

No marketer wants to see people unsubscribe from their list, but face facts, sometimes people want to stop receiving messages. Make sure you put the unsubscribe information in every message so people can unsubscribe with a tap or click. Make it so simple that people know they can quit that they are okay with staying (counter-intuitive, yes, but true nonetheless). Even go so far as checking in with subscribers once in awhile (especially the ones who aren't opening or reacting to your messages) and asking if they still want to get the messages. Some people will opt out. That's great, that's one less message you have to pay for and one less person who isn't really interested your offer anyway.

MEASURING SUCCESS

In the productivity space people talk about setting S.M.A.R.T. goals as one of the keys to success. S.M.A.R.T. stands for Specific Measurable Achievable Realistic and Tangible. Note the second word: measurable. The key to successful SMS marketing is being able to measure all facets of your campaign. From the number of failed messages to opens to clicks to actions, if you don't know the whole picture, you can't really understand your campaigns and you don't know if you're successful.

Your SMS marketing partner and platform need to have robust metrics and reporting so you can manage and optimize your campaigns effectively.

ADDITIONAL RESOURCES

If you'd like to learn more about mobile and SMS marketing best practices, here are some additional resources that you might like:

- [Mobile Marketing Association Best Practices](#)
- [CTIA Short Code Handbook](#)
- [Adobe on SMS marketing](#)

MARKETER'S GUIDE TO **EMAIL** AND **OMNI CHANNEL** MARKETING

CHAPTER 5

EMAIL IS THE UNIVERSAL COMMUNICATIONS CONNECTOR

There are almost 62 million results on Google for email marketing, which means this one post isn't going to be enough to give you a complete picture of email marketing. So this post isn't going to be about email marketing, this post is going to be about email marketing in the new era of omni channel marketing. Email has gotten a lot of flak recently. There have been hundreds of posts saying email is dead, it's not dead, this app will kill email, and that app will save email.

It's a little much.

And the death of email is really overblown. Like it or not, email is a universal communications tool. Email might not be great for project management or group conversations, it's still great for newsletters and other mass updates. Email is still great for support. Email is still great for sending rich content to customers.

Bottom line: email is still essential to marketing. What's changed is that email can now be much more engaging and powerful when integrated with other communications channels.

RECENT TRENDS IN EMAIL MARKETING

A quick read of some of the top email marketing trends for 2016 gives some really interesting patterns in how email marketing has, and hasn't changed, in recent years. People are reading emails on mobile devices more and more often, people expect personalized content, HTML 5 is making emails more interactive, and privacy issues are still on people's minds. These email trends and more illustrate not just the changing landscape of email marketing, but more importantly that email remains the foundation of all online marketing communications.

TOP EMAIL MARKETING TRENDS FOR 2016

- [Smart Insights](#)
- [Marketing Profs](#)
- [Econsultancy](#)
- [Business2Community](#)
- [Search Engine Journal](#)
- [Campaign Monitor](#)

IT'S A MOBILE EMAIL WORLD

People aren't just reading emails on mobile devices more often, trends suggest that people mostly read emails on mobile devices—at least when the email first comes in. This is interesting for a few reasons. One is it's absolutely critical to make sure all your emails—from newsletters to support responses to auto-responders—are mobile friendly. There are still too many email newsletters that are unreadable even on a tablet, much less a phone, and this “little thing” makes a big difference to how customers engage with you. The next thing to consider is if people are most likely already on their mobile device when they are reading your email, what can you leverage next? Launch your app? Download an app? What would you like people to do if you're already in the palm of their hands. One final consideration is how you deal with people downloading PDFs and other materials. Consider that someone using a mobile device can't always just save the file to a drive. Consider other ways they can access and save the document for later.

EVEN MORE PERSONALIZED CONTENT WILL BE THE NORM

We've gotten used to being able to tailor some aspects of the emails we receive from companies. Would you like to receive daily deals? Weekly updates? Some kinds of promotions and not others? But those choices were ours, we made the choices and selections ourselves. With big data tools available to more companies, email marketing is going to become automatically more personalized. We see this already with Amazon's shopping suggestions, but what about a SaaS vendor automatically sending you newsletters tailored to the kinds of questions you ask in forums and how you use their tool? What if your project management tool “knew” you were in marketing and not sales and created a completely marketing focused newsletter for you that helped you use their tool more effectively in the work you do.

Yes, this is complicated stuff. This means connecting all your communications channels together into a single omni channel. It means holistically understanding your customers and not just as an account or number. When you connect all your systems, SMS, push, app usage, voice, support, commerce, and email, you know a lot about your customer. Integrated systems power integrated and customized messaging. Welcome to the era of automated individualized marketing campaigns.



SPOTLIGHT ON PRIVACY AND DATA COLLECTION

Every hack, every email leak, each time there is a warning that this company or that was targeted by hackers, people are reminded how much of their personal data is stored online. None of this is news to us. People are wary of giving their information, especially if they are afraid they will get spammed or signed up for something they don't want. It's good that people are aware of privacy issues, online privacy is important for everyone. As marketers we need to be upfront with people about what data is being collected, why, how it will be used, will it be shared, and what control people have over their data. In a growing number of countries, consumers can request to see all the data a company has stored about them and ask to have the data removed. This is a draconian approach to privacy, but we need to be cognizant that privacy and data collection are increasingly on consumer's minds and behave accordingly.

INTERACTIVE EMAILS LEVERAGE HTML5

The cutting edge crowd might be excited about interactive, rich emails coming to an inbox near you, but large-scale adoption of interactive emails is probably only a few years away. Beyond the sheer complexity of compacting HTML5 into an email template, if most emails are going to be read on mobile devices, there are a lot of variations to test. Since it's essential to have a consistent user experience regardless of device or platform, mainstream adoption of HTML5 interactive email will be hard, but that doesn't mean that it's not worth investigating or testing.

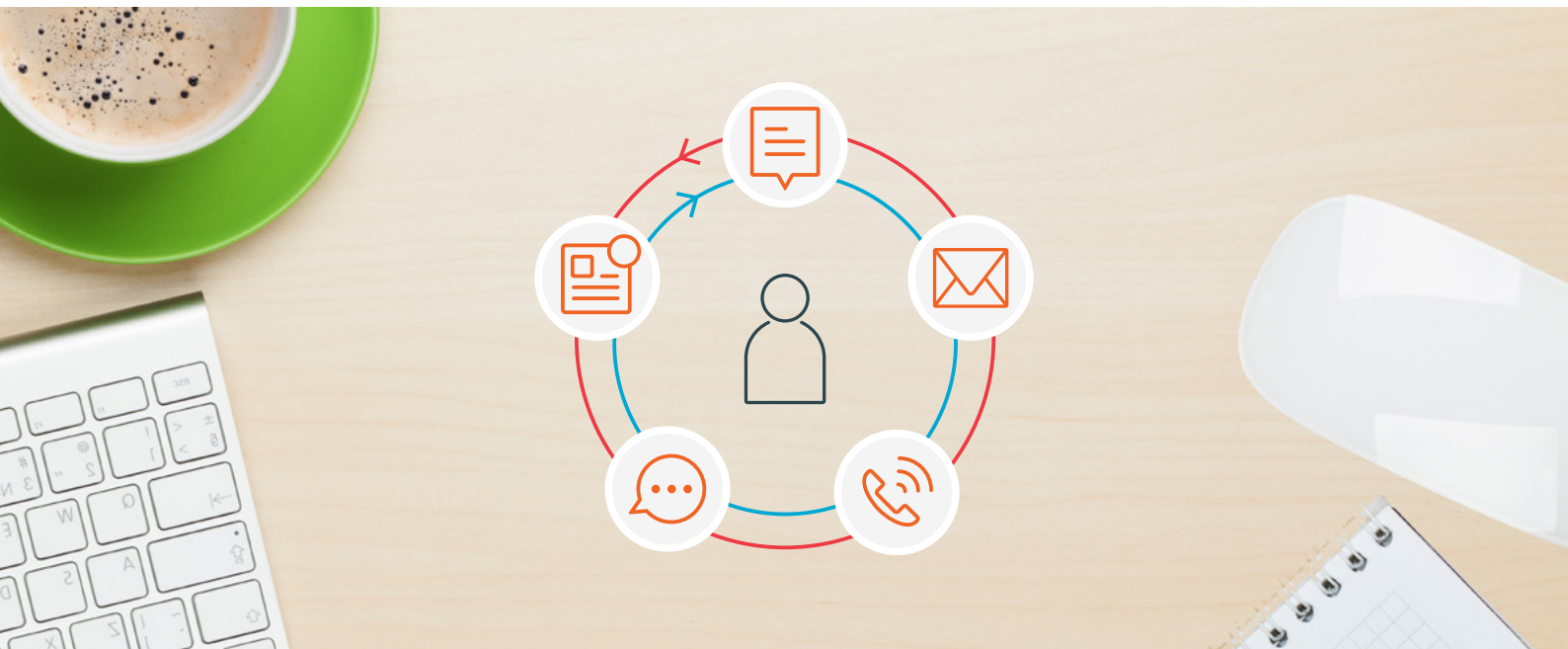
AUTOMATION FINALLY LIVES UP TO ITS PROMISE

Marketing automation and email marketing are closely intertwined. Companies have invested thousands and thousands of dollars into email marketing automation tools that might not have lived up to their promise. According to experts, automation tools are getting better and marketers need to start leveraging them more. Combining marketing automation with all the data you have for making personalized emails, marketers should be able to create automated campaigns that adapt to customers as customers react to it.

Imagine email campaigns that adapt to customer preferences intelligently to increase opens, clicks, and purchases. We're not far off from that reality, what's missing is the unsaid trend amongst all these other trends: omni channel communications and unified messaging.

THE UNSAID TREND IS OMNI CHANNEL

As the boy in The Matrix said “There is no spoon.” Just so there is no email marketing any longer. There is no online marketing. There isn’t even SMS marketing. Today we’re heading (back?) to just plain marketing and that covers everything. When print connected with TV it was ground-breaking. Though not really considering movies and radio had been linking media for years. When URLs were in magazines and TV people wondered who would ever put down a magazine or stop watching TV to use a computer. Now many of us watch TV with devices in hand and read those magazines on phones and tablets (making including a URL smart advertising). We’ve been living in an omni channel (or at least multi channel) marketing world for decades, the difference today is how tightly we can integrate all of the channels together and measure the results. It’s easy to go from reading about a new fitness regime in a sponsored post to personalized offers in the publication’s newsletter to an SMS with a coupon for your next purchase. And as marketers, we can take that trail of data, connect the dots and create buyer persona profiles.



The trend with integrating data and personalized emails and ensuring mobile support is directly connected to the omni channel view of how consumers engage with brands. By the same token, omni channel marketing raises more questions and fears about data collection and privacy. When marketing crosses the line from clever and convenient to creepy and concerning, people start asking “just how much do companies know about me”. It’s that fear that proactive efforts on informing consumers about data and privacy works to alleviate. As marketers we can’t ignore consumer fears about privacy and data gathering. We need to ensure we put real rigor around how data is collected, aggregated, and stored.

Consider this omni channel customer experience from a [recent Venture Beat post](#):

Consider this: It's one thing to make a restaurant reservation via an ad, or an app, or a messaging channel. It's another one to get a seamless dining experience upon making the reservation; get picked up by a ride-hailing service like Uber or Lyft to get to the restaurant right on time without having to order it; browse and order ahead from the menu during the ride without having to search for it; receive and pay the bill upon walking out without having to pull out a credit card; get picked up to go home without needing to enter the address, etc.

While this example doesn't include email, it probably does if you consider that all the transactions mentioned in the quote are probably emailed to the person. This is what omni channel is working towards and regardless of what the tech pundits say, email is a long way from dead.

PICKING THE RIGHT REASONS TO USE EMAIL

The key for email in the omni channel world is picking the right use cases. Email is great for newsletters. It's great for receipts and confirmations. It's great for things people need to remember like site registrations and logins. Email has gone from being good for everything to let's decide what it's really best for.

MARKETER'S GUIDE TO **PUSH**

TAPPING INTO BETTER CUSTOMER
ENGAGEMENT

CHAPTER 6

THERE IS MORE TO PUSH THAN QUICK UPDATES

Before the iPhone was released push notifications were around, but it wasn't until the iPhone arrived that push notifications started to really come into their own. As iOS has matured, push notifications have gotten richer and more intelligent, including the most recent changes to notifications in iOS 10. Now rich push notifications are an integral part of all smartphones and are a powerful way to reach and engage customers.

As useful as push notifications are, and how much they can improve customer engagement, there is still a lot of confusion around how best to use them for marketing and how push fits into a omni channel messaging mix. This post starts to hammer at both implementation and omni channel integration question.



**BOOST, ENGAGE,
AND CONNECT
WITH USERS IN
NEW WAYS**

PUSH AS REDEFINED BY APPLE AND iOS

Apple didn't invent push notifications on mobile devices, but Apple did change the push game by creating more push options and innovative solutions for users. Today we have push notifications on both mobile devices and desktops. OS and app makers strive to build seamless push experiences across devices. Push isn't just letting you know you have a new email or an update on Facebook. Push notifications are richer and can be used by marketers to boost engagement and connect with users in new ways.

AN ENGAGING SOLUTION

When we're talking about push notifications for marketing, we're talking about messages that go beyond basic updates like "You have a new email from...". Push messaging for marketing needs engage and connect with users with valuable information or offers. Planning push campaigns are just like planning any other marketing communications tactic. You need to define the audience, the value, the timing, the frequency, and success before you start sending messages to users.

Push messages might be the most intrusive messages we can send to people. It's easy to miss an SMS, or even a phone call, but something that pops up—and stays there—on your screen is going to keep you from using your device until it's acknowledged. While devices have different kinds of push notifications—from the box that must be tapped to close to smaller banners that disappear on their own—push is designed to engage the user and get their attention. This means that whatever we do with push messages must consider if the interruption is going to be seen as valuable to users or annoying.



SEGMENTING USERS


The first step to sending valuable push messages is not treating all your users the same way. Someone who just downloaded your app or started using your service is very different from a long-time user or someone who stopped using the app after a little while. When you're planning a push campaign, first decide who the campaign is for and then determine what would be either of most value to that user at that moment, what could you offer to help the user use your app better, what would help subscribe/use your app more. Different apps have different ways to approach this segmentation and what to offer. A social coupon app might offer a new user a special new coupon just for new people but a loyal user might get a special discount, and a user in between could be offered a special deal if they refer a friend. Productivity apps offer tips to start and ways to expand using the app to power users (especially if those expansions require a purchase). Games give bonuses to start, to keep playing, and for unlocking levels as you play.

It isn't the offer but who is getting the offer and when during the app life cycle that matters most.

CONTENT MATTERS

Just as segmentation for push makes messages more effective, content is what seals the deal. Like all messages you send to customers and users push content needs to be relevant, timely, and useful to engage. Getting a discount coupon for flowers and chocolate on February 15th is great content delivered at the wrong time. How do you figure out the right content? Start with your user segments and figure out what your segments need from you. Because push messages are so pushy, it's especially critical that you plan your content well. Have a plan that matches messages to segments over time.

Push messages can contain more than just text, but your primary goal should be to get the user to tap and go to your app for more information. Make sure when you test your push messaging content you test through the entire cycle. When users tap a notification that there are important updates available, they should be brought exactly to the place where the updates are presented. Same goes for coupons, upgrades, new content, and offers. Don't make your users go hunting for what's in the push message. It will only take a few bad experiences for them to go from being ones of the 52% who allow push messages to ones of the 48% who don't.



**CONTENT NEEDS
TO BE RELEVANT,
TIMELY, AND
USEFUL TO
ENGAGE**

GET THE TIMING RIGHT

Time sensitive messages have to arrive at the right time to be valuable, and messages in the middle of the night are especially annoying to users. As part of planning and segmenting, make sure you know your user's time zone so lunch coupon offers come just before lunch and a special, limited-time offer isn't sent in the middle of the night.

Even once you consider time zones there is the time of day for general messages. Do messages sent in the morning do better than ones sent in the afternoon? Are evenings good times to send discounts for in-app game purchases? Some data shows messages are best received in the late morning to afternoon, but is unclear if this is only the case during the work week versus the weekends. Message timing for push is even more critical than for other types of messages because once the push arrives it might only be visible for a few seconds—and can't be (easily) read again. Emails and SMS are typically stored and not deleted immediately so going back to an email or SMS is possible. With a push message, once the message is gone; it's gone.

ADJUSTING FREQUENCY

Looking at best practices, the consensus is that sending 1-3 messages a day is about the maximum you can do without users turning notifications off for your app. This is the biggest risk with push, once notifications are off, it's not easy to get users to turn them back on. Several articles found that the line between just right and too many messages is razor thin. Sending one push message a day might be fine, but even two might be too much. Some users might consider 2 messages a week too many! The right number depends on what your app is and what your user base expects. We expect some apps to send notifications often (email, Facebook, Twitter, SMS), but we expect games and even some productivity apps to be "quieter".

Hard and fast rule? Not likely. For content, timing and frequency there is only one thing that will lead to success—ruthless experimentation.

RUTHLESS EXPERIMENTATION

Testing and experimenting are at the heart of all marketing communications strategies. Ruthless experimentation doesn't mean just trying everything under the sun and seeing what happens. Experiments need a question and an expected result to be worthwhile. Let's take testing the frequency of free game token offers to users who played your game, then stopped. For that segment you might think that sending two messages a day will get people to come back and play the game more than 1 or 3 times. So you take a group of users from that segment and test it.

Where testing gets tricky around push is turning off notifications. If you test something on your entire user segment you might wind up learning something, but also you might wind up causing a lot of users to turn the notifications off. Now, you might have some data for a new cohort of users, but you've exhausted your existing cohort. Push notifications are a powerful tool for engaging and re-engaging users, but it's also the trickiest to work with. Your experiments have to be well thought out and conservative with testing on your users.

As you test though, you get a better sense of what messages work with which users at what time and frequency. Early on you might start with intuition-based guesses, but as you analyze your data you can start making better and better predictions for the outcomes. Or at least be surprised by your results less often.

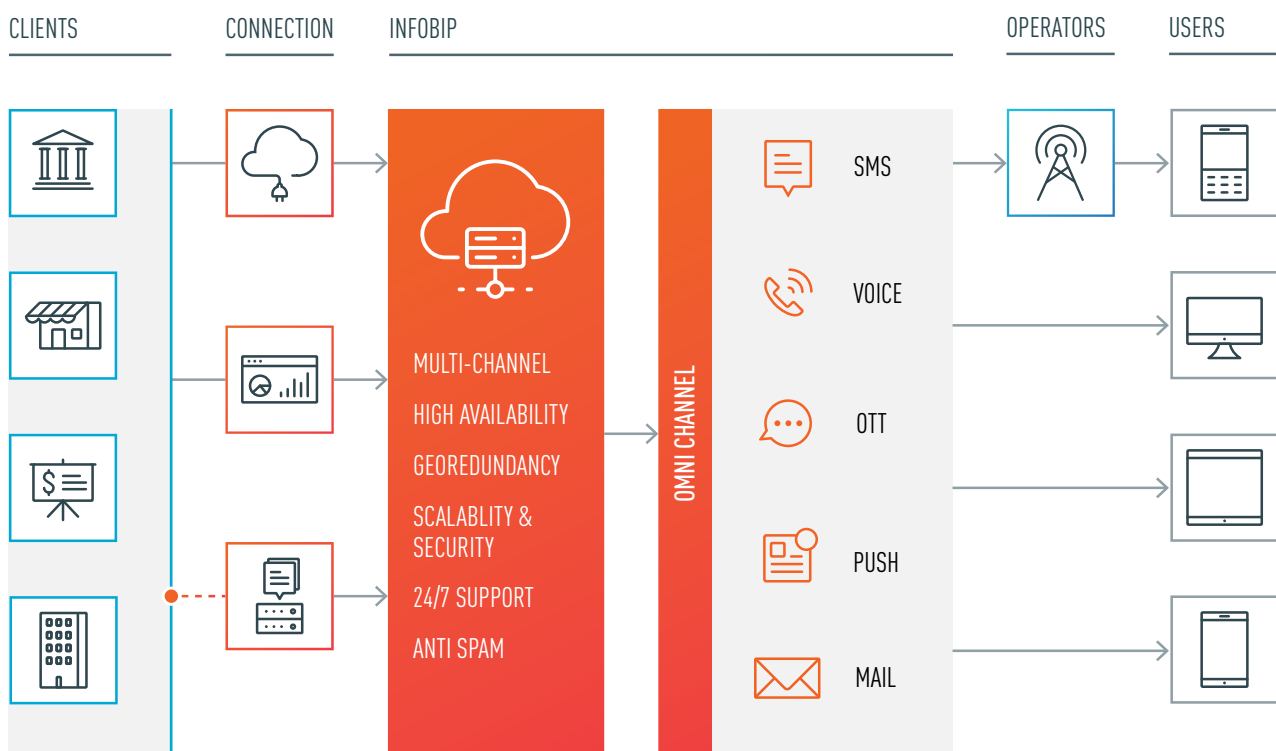
PUSH AS PART OF OMNI

Push messages are a critical part of omni messaging. You can send a newsletter that has limited time offers, but a customer might not see the email in time. You might send a push alert with a traffic update, but that might not stay on the screen or someone might miss it. A push notification gets the information right in front of someone. Tap now to get 50% and free shipping on your next purchase. Alert: Major delays on your route home. These messages if they can pop up, and stay up on the screen will help the user and you get more out of your app and service.

But how do you align all these channels? An omni channel communications platform like from Infobip manages all your data and messages together. You can segment users for push, email, and SMS campaigns and see which ones are most successful with robust reporting and data tools. See if sending a reminder through push gets more newsletter opens. See if your newsletter can get people to open your app so you can prompt to turn push notifications back on for special deals. Combine SMS and push messages together so alerts and updates are read in time.

THE FINAL STEP: A PLATFORM THAT DOES IT ALL FOR YOU

Communications platform as a service (cPaaS) is the collection of all these omni channel communications and messaging tools into a single unified tool.



MARKETER'S GUIDE TO **cPaaS**

MERGING COMMUNICATIONS
TOOLS FOR UNIVERSAL
MESSAGING

CHAPTER 7

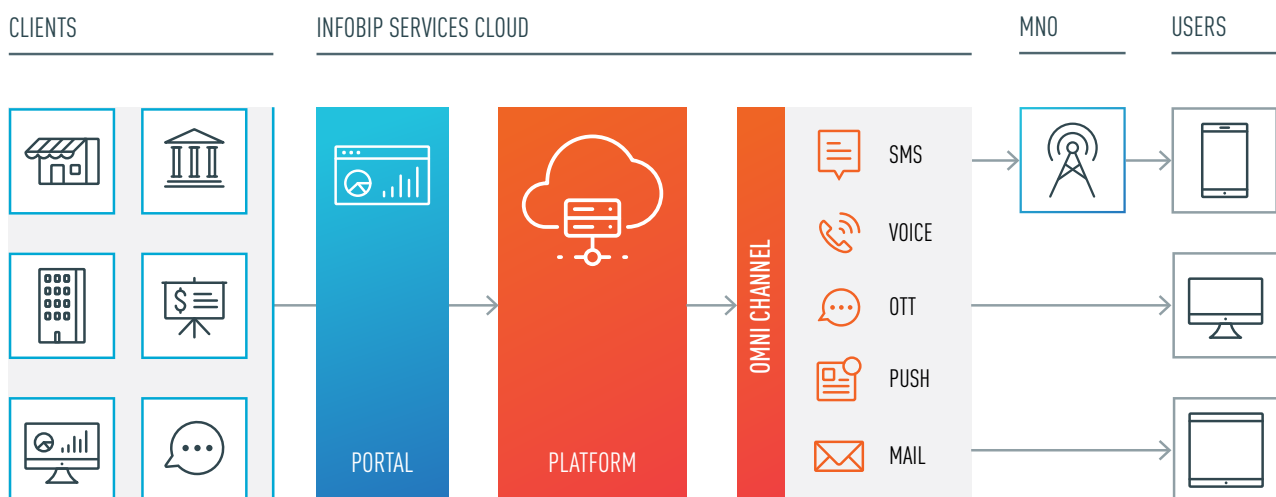
EFFECTIVE COMMUNICATIONS AND MESSAGING NEED AN INTEGRATED APPROACH. THAT'S cPaaS.

Let's dispel the myth that in the past it was simpler and easier to communicate with consumers than it is today. It's never been easy. There have always been complications, nuances, and best practices. Today, the challenges are less in finding what to say to whom, but in finding out which channels best fit your target audience(s). Once you determine the right channels (there's no magic bullet here), how do you manage and coordinate all your messages? How do you manage segments, buying stages, and life cycle nurturing?

Until recently, marketers have been left to cobble together separate solutions for email, push, SMS, voice, chat, and all other channels they use. Sometimes you could put a couple together, but rarely all of them. A single solution that seamlessly combined them all, which you didn't have to build and host yourself, was like catching a unicorn. And let's not forget managing your lead lists, customers lists, and segments. You want to have a clear overview of all your recipients, segmented as they are, in one place. Have you been able to pull that off successfully?

Didn't think so.

We know that an integrated approach to communications and messaging works best, but finding that solution has been near impossible. This is precisely why the Communications Platform as a Service (cPaaS) idea emerged; to finally have a hosted, multi-service solution that integrates messaging, user segments, and reporting into a single web portal to handle all campaign needs.



As a term, and industry sector, cPaaS is still new and the market is still trying to understand how it fits into communications in general. Gartner defines cPaaS as:

“When PaaS offers are specifically oriented toward supporting communication functionality, these are called communications PaaS, or cPaaS. In several cases, these platforms are integrated with special purpose communications infrastructure, while in other cases these operate on public IaaS offers. Increasingly, business application developers want to extend their applications with SMS, MMS, speech recognition, mobile browsing, two-factor authentication, intelligent assistants and other emerging options for fixed and mobile interactions. Additionally, enterprises are rethinking how they offer services, developing highly interactive automated customer and service experiences that allow them to compete in the emerging digital business and digital customer service and digital workplace. Today, cPaaS platforms are evolving to address this new class of enterprise communication requirements.”

Gartner’s definition helps put cPaaS in context with other solutions and deals with its unique value to marketers: cPaaS is the one stop shop for communications that go beyond just sending messages. The power of cPaaS is connecting mobile, communications, web, email, payments, and security into a powerful tool marketers can leverage to engage with customers.

OMNI CHANNEL COMMUNICATIONS AND cPaaS ARE INTERTWINED

It’s no accident that omni channel communications and cPaaS have evolved together. To achieve the promise of omni channel communications and messaging you need a platform to run it on. Trying to build an omni channel platform on your own is almost out of the question. Marketing automation tools cover some facets of omni (usually just push and email) while lacking the ability to include SMS, voice, and OTT chat into their workflows. Marketing automation tools are still essential, but we need to expand their scope to include more messaging platforms, more data, and better segmentation than before. The promise of marketing automation gave marketers a taste of coordinated messaging, but once marketing programs got more complicated, marketing automation tools needed to be augmented with something bigger.

That something bigger is cPaaS.

WHAT cPaaS LOOKS LIKE FROM THE INSIDE

The best part of cPaaS isn't how many tools it integrates, but how familiar it is to any marketer who has used integrated marketing automation in the past. Top tier cPaaS systems have web-based user portals so users can manage all their communications channels in one place. CPaaS portals give you the tools to create, manage, and measure campaigns in one place. Here's an example:



Anyone who has used SaaS tools in the past will be familiar with the layout and operation of a cPaaS portal. From your single portal view you can manage, and measure, all of your campaigns. cPaaS is the tool that makes omni channel communications come alive and serve as an essential tool for marketers.

cPaaS BRINGS INTEGRATED COMMUNICATIONS TO LIFE

The key part of cPaaS isn't communication or being part of a service, it's the platform that makes it powerful. There are lots of separate tools for all the functions contained within a robust cPaaS system, but if you use one service for SMS another for email and another for 2-Factor Authentication (yes, security needs to be part of your cPaaS too) you have to integrate them together. You need to figure out how to keep a single master list of customers, segments, and communications preferences. You have to manage who has opted out of email, but still wants SMS messages. You have to manage who is in your "just starting out" segment versus a "power user who pays" segment on each of the disparate systems.

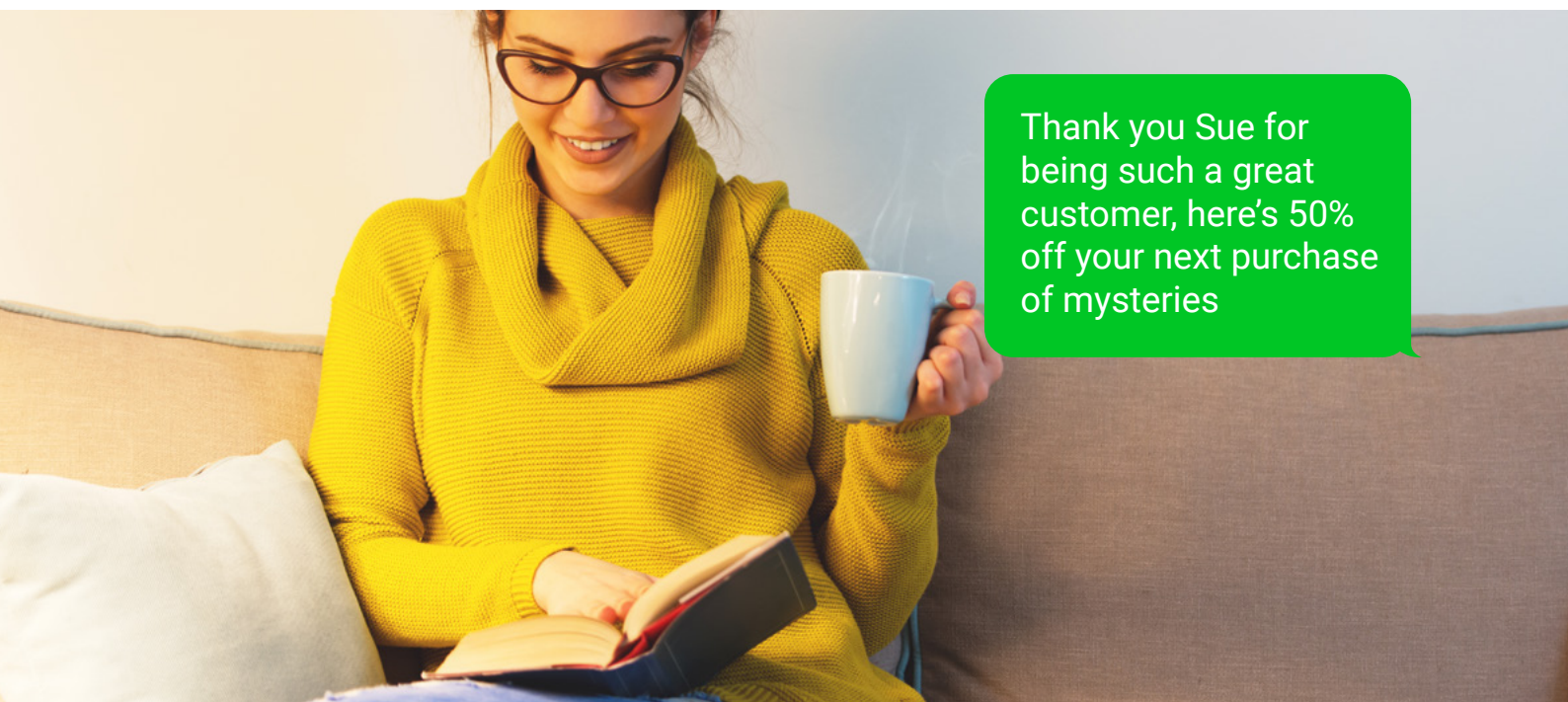
Every time you have to integrate a new system into your marketing communications mix, you not only make your job more complex, you increase costs, and increase the chance of making a mistake. With separate systems it's all too easy for marketing to send an email newsletter to a group of power users who just got a special message from customer success. Maybe two emails in a day isn't too much, but what if the newsletter was actually meant for new users and somehow your power users were included? That's not the kind of coordinated messaging that wins people over. Those mistakes are what makes companies look disorganized and careless.



IT'S THE
PLATFORM THAT
MAKES cPaaS
POWERFUL.

THE FUTURE IS SINGLE MESSAGING TO YOUR SEGMENTED GROUPS

We know that people are different, but we also know that groups of people behave in similar ways. An essential part of omni channel communications, as powered by modern cPaaS tools, is segmenting your users into groups who can receive a single message. But even more than a single message, a single personalized message that could highlight what they browsed or bought, what they read and clicked, or what they shared or loved. Those segments of people can be treated as a single group for messaging, but still personalized for maximum engagement. Within a cPaaS system it's simple to say "Thank you Bill for being such a great customer, here's 50% off your next purchase of fly fishing accessories" and also say "Thank you Sue for being such a great customer, here's 50% off your next purchase of mysteries" for customers with similar buying profiles, even though they buy completely different things. And if Bill likes email and Sue likes SMS, each of them get the message how they want to receive it. If one segment does better with push message alerts or over chat, then that's how you reach those sub-segments of each larger segment.



Messages to nurture potential customers through the lead funnel and completely different messages for customers at each stage their own lifecycle. Then you take all of those messages and all of those segments and analyze them so you can understand which messages help you the most, and which don't. Segmentation combined with metrics and measurement is the only way to truly understand what's working and what isn't. And only a fully capable omni channel communications cPaaS system can do that for you.

COMING BACK FULL CIRCLE

We started this series talking about the big picture-omni channel communications-then talked about each component part (APIs, SMS technically, SMS best practices, email, and push). Now we come back to omni channel as the reason that cPaaS exists in the first place. The first chapter talked about how consumer preferences were changing. How people want to receive different kinds of messages on different media and devices. After going through each piece of the puzzle, you see how they all fit in together to make the cohesive whole—and cPaaS makes this a reality.

The reason why we started with omni channel communications first was to help you understand the direction modern communications are moving. We're ending with cPaaS, giving you the vehicle to get there. Marketing communications are complicated enough without needing to worry about how to juggle all the parts together. How to keep one segmented customer list. How to manage communications with people who like SMS versus email. Which of your users has enabled 2-Factor Authentication and who hasn't. Who reacts to push messaging offers and who turned off their notifications altogether.

This is the world of omni channel communications. This is the world of cPaaS. This is the world that Infobip is creating. If you'd like to learn more about our omni channel communications powered by a robust cPaaS engine come talk to us.

ABOUT INFOBIP

Infobip is a global mobile cloud communications platform enabling companies and developers to reach 7 billion mobile devices connected to over 800 telecoms networks. Operating 50+ offices in 40+ countries, Infobip innovates at the intersection of digital communications and telecoms technologies, creating new ways and opportunities for businesses and consumers to interact over mobile devices. Its proprietary platform has 200 000 accounts, and processes around 5 percent of the global A2P SMS volume. The company is self-funded and is headquartered in London, UK, with offices on six continents.

