

Communicate *Cordially* with SMS Marketing

A practical approach to
creating an engaging SMS
messaging strategy

cordial

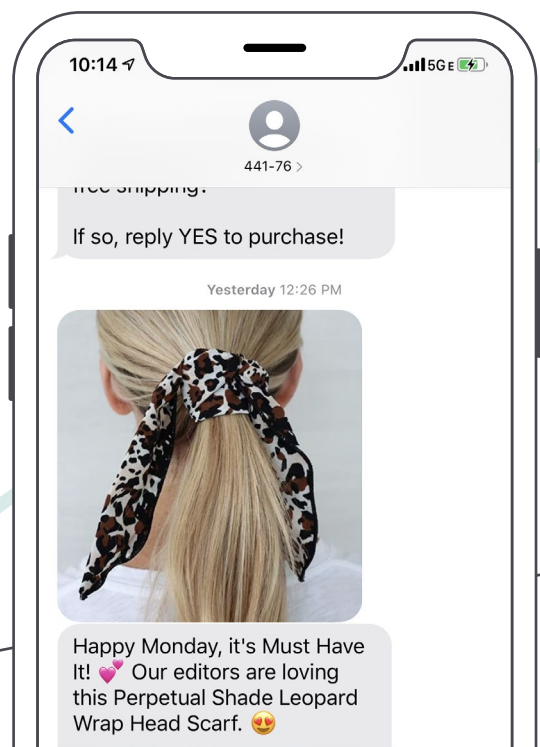


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Introduction

Mobile usage is at an all-time high and smartphones are the hub for an increasing number of online experiences. People are using their smartphones more frequently and for longer periods of time.

The average person checks their phone 200 times a day, and according to Deloitte's U.S. edition of the [2018 global mobile consumer survey](#), smartphones continue to be the preferred device for online actions.

There are myriad reasons why people are checking their phones 200 times a day and most can be traced back to our culture of NOW. New digital experiences such as Amazon Prime Now, Google Express and Postmates have created a new market for people who demand instant gratification. If you can deliver experiences that can satisfy this immediacy, you will be rewarded with [higher lifetime value](#) and loyalty from your customers because you've met them where they are. Customers who embrace your brand on multiple channels—email, social, mobile—are likely your best customers, and they should be rewarded with the most personal, relevant messaging crafted with an understanding of their unique behaviors and interests.

Building on this trend, marketers have embraced mobile marketing and are using it to engage customers more than ever before. SMS is at the forefront of that effort, representing a new frontier in one-to-one communication. While tried-and-true channels like email and social remain an important part of the marketing mix, SMS has distinguished itself as an important and powerful tool in the modern marketer's toolbox. Surprisingly, according to Gartner, [~60% of marketers](#) have not started using this channel and one-third of companies have no plans to start!



200x

the average person checks their phone 200 times a day



~60%

of marketers have not started using SMS



1/3

of marketers don't plan to start using SMS

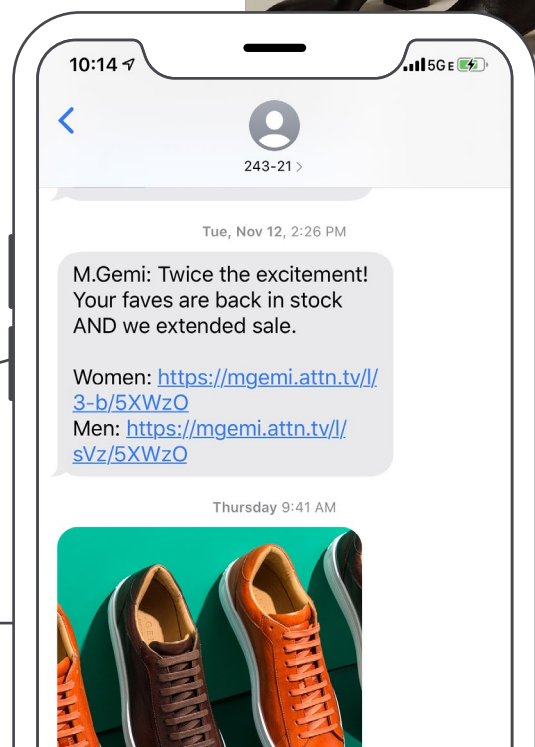
This untapped audience is primed for personal messaging; however it does come at premium pricing, and marketers should be prepared that traditional email CPMs will not apply to this channel.

SMS marketing is so effective because mobile phones are the most personal device we own. Most people store their entire lives in their phone, which means it's always close by. In fact, according to [Text Local's State of SMS](#), text messages have a 98% open rate. That means that your message is almost guaranteed to reach your customer. Additionally, text messages can now be personalized the same way emails are. Every aspect of the message, from message content to coupon codes and images, can be based on real-time behavior and business data.

In this guide, we'll share important strategies that will help you build an effective SMS marketing strategy to augment your existing marketing efforts. Remember, SMS is not a magic bullet, but a useful tool, that when deployed correctly can make a huge impact on your bottom line. If you are not already considering adding SMS to your roster, we hope this guide will change your mind.

98%

open rate for text messages
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State of SMS



The types of SMS communications

There are two distinct types of SMS communications: transactional and promotional, each of which plays a specific role within the marketing mix.

Transactional, or service-based messages are the most common type, but promotional messages are becoming more and more popular as SMS gains traction.

Transactional Messages

Transactional messages are a powerful way to communicate important updates to customers. Unlike email, where the message can go unread for hours or days, most text messages are read immediately, which make them an effective medium for delivering time-sensitive information.

Here are some examples of transactional messages that you can send to your customers:

- Order confirmations
- Shipping alerts
- Delivery notifications
- Product updates
- Congratulatory prompts
- Time-triggered reminders
- Claim processing alerts
- Real-time ticket alerts
- Account balance updates

We are confirming your reservation at Wayan for this evening. Please reply "confirm" or "cancel" directly to this text. Thank you.

Thu, Oct 10, 1:07PM

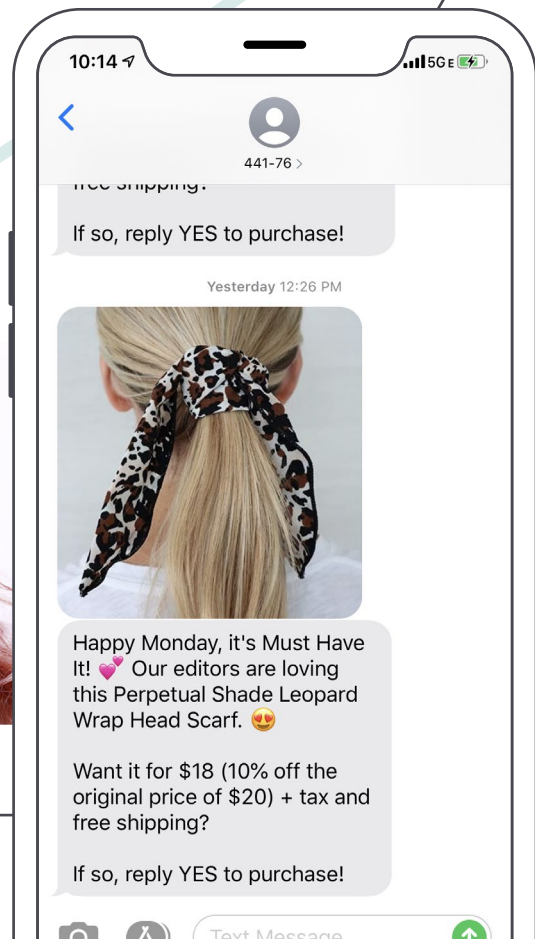
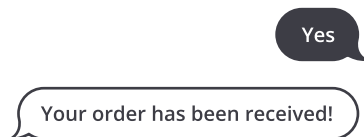
Confirm

Promotional Messages

Whereas transactional messages are informational by nature, promotional messages contain content that's created to inspire action. These messages promote products or services and should have a limited time frame to create a sense of urgency.

Here are a few examples of promotional message campaigns you could send:

- Flash sales
- Back-in-stock notifications
- Personalized coupon codes
- Geolocation triggers
- Price drop notifications

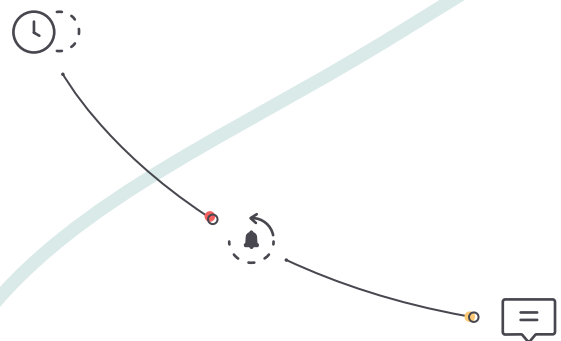


The importance of real-time data

Before we dive deeper into SMS, we'll take a moment to discuss the importance of real-time data when deploying a successful SMS campaign.

Because you're sending SMS messages to a user's most personal device, it's critical that the message content is both timely and relevant. The threshold for discontent is much lower than in other mediums. For example, if your customer receives an irrelevant email, they may give you a pass, but if they receive an irrelevant text message, they are much more likely to unsubscribe.

The use of real-time data to trigger and personalize communications helps prevent this from happening. Modern messaging platforms like **Cordial** can track real-time user behavior and events and use that information to automate the creation of personalized messages. Before implementing an SMS program, make sure that you can leverage all of your customer and business data to personalize your messages.



If you build it, they will come

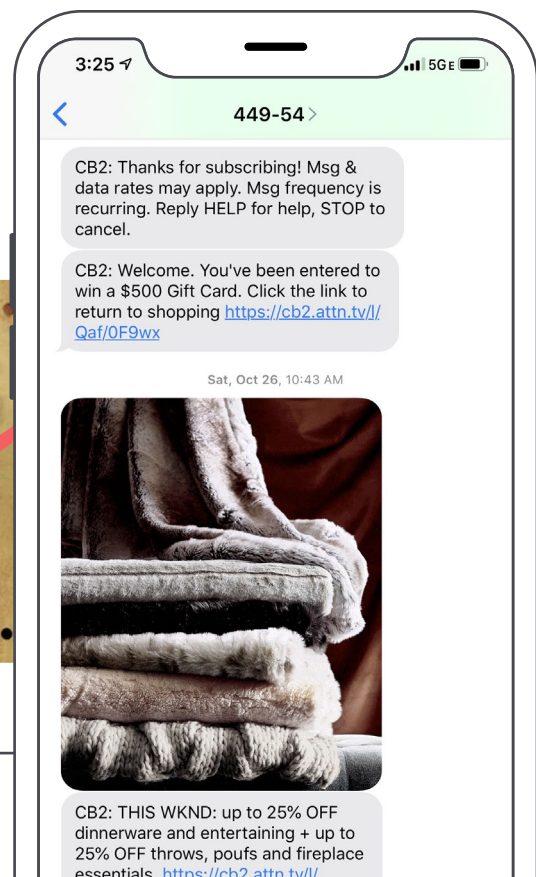
When framing your strategy for SMS, keep in mind that the customer is giving you a very valuable, very personal piece of information.

They are allowing you the privilege of sending them messages to their phone or other device, and trusting you to employ governance and tact when sending them messages. Therefore, when deciding what kind of text messages you'll send, take into consideration the commitment a consumer is making when opting in to receive your messages. Successful campaigns offer something to their subscribers that is of equal value to that commitment, and some of the most successful lean heavily on exclusivity to engage customers. Everything in your message should be relevant and exclusive to your subscribers.

Stick to the plan

Having a rock-solid messaging strategy before you begin sending messages is essential to long-term success and growth.

A sound strategy about the types of messages you want to send is not only essential for success, it is also essential to your activation plan for the various carriers. A strategy enables you to set the proper expectations with both the carrier and your subscribers about what you plan to communicate and how many messages your subscribers will receive. If you set the expectation that you will send one message per week about upcoming promotions, stick to that cadence. Don't all of a sudden start sending one message each day. This will result in brand dissociation and unsubscribes and a potential sending block from your carrier. If you need to change your strategy, make sure your subscribers are aware so that they can opt-out.



Long codes, short codes, vanity codes, oh my...

Unfortunately, sending SMS messages as a business isn't as easy as it is for an individual.

You will need to determine how your program will run and decide on either a short code or a long code. A short code is an easy-to-remember 5- or 6-digit number used to send messages while a long code is a 10-digit number closely resembling a standard phone number.

Long Codes

Long codes can often make messages feel like they are coming from a person, not a bot. However, this level of personalization comes with a price tag, as well as reduced throughput. Messages sent from a long code can be processed at a rate of only one message per second. In addition, you cannot send MMS (video or image) messages via a long code. Long codes work best when your business strategy is focused on customer service, communicating one-to-one with your customers, or if you prefer to have a consistent number across channels.


1

message per second is
the rate at which messages sent
from long code are processed

Short Codes

Short codes are Cordial's recommended method of sending marketing messages to your subscribers. They have greater message throughput than long codes and are easier to acquire. When you register a shortcode a random 5 or 6 digit number will be assigned to your business which you can then use to begin sending. Remember, it takes anywhere from 8-12 weeks to register your short code, so if you want to start sending SMS messages, start planning a few months in advance.

8-12

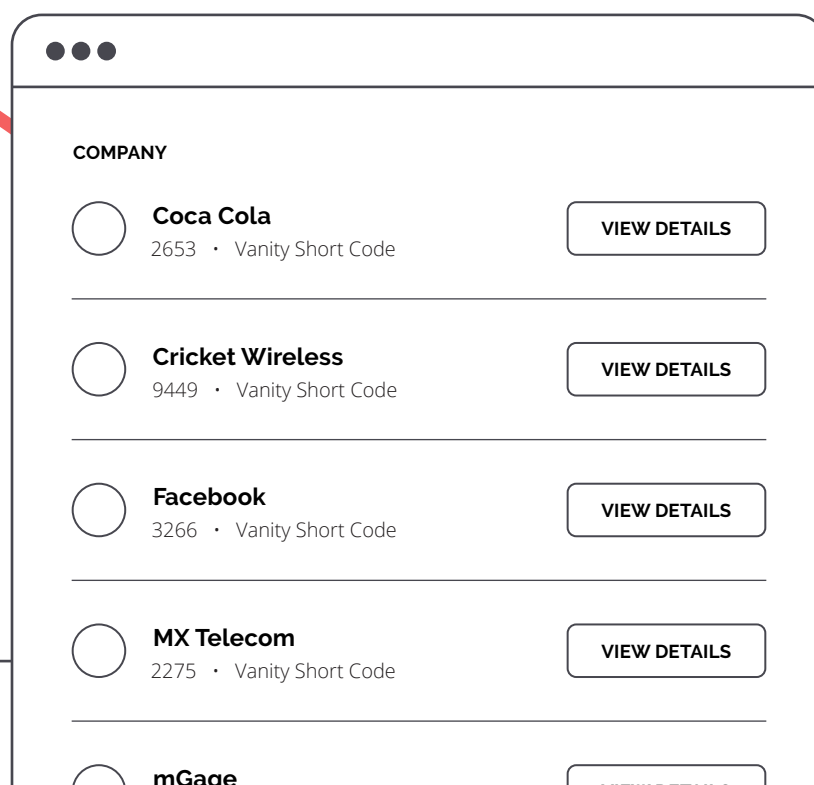
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Vanity Short Codes

If you would like to choose your short code you can acquire what is known as a vanity short code (think vanity license plate but for SMS). Most large organizations have a dedicated short code, but keep in mind that vanity codes generally cost 2x more than a normal short code and can take longer to register. When choosing a vanity code, you can use the [U.S. Short Code Directory](#) as a resource to find which codes are being used by which companies, and which codes are available for purchase or registration.

2x

the cost for a vanity code
compared to a normal short code



Compliance is priority #1

Because you are sending messages directly to a user's smartphone, there are strict rules and regulations about what messages you can send and how you send them.

The Telephone Communications Protection Act (TCPA) is the set of regulations that governs how companies can communicate with SMS messages and the Federal Communications Commission (FCC) oversees compliance. In the next few sections we'll detail the various aspects of SMS compliance so you can send marketing messages worry free.

Remember, we are not legal experts, so please consult with legal counsel to make sure you are 100% compliant.

The Opt-In

Opt-ins are the most critical aspect of SMS compliance. If you text people without their explicit permission, it's considered spam and you risk facing legal repercussions. You, as a marketer, must receive express written consent from contacts before you can start sending them SMS marketing messages. That consent needs to be clear and straightforward—not buried in your terms and conditions. Present clear language and ensure that consent is concisely stated, perhaps with a checkbox. In addition to physical written consent, your customers can opt in to your SMS campaigns using a few different methods. The two most common are mobile opt-in and web opt-in.

Mobile Opt-In:

Consumers can use their mobile phone to text a keyword to a short code number. Promote your keyword and short code on advertisements, emails, or ads to encourage people to subscribe to your list.

Web Opt-In:

Using a form or landing page on your website, during a newsletter sign-up or at check-out, you could ask the customer for permission to send them text messages. Again, you are looking for express consent to send them messages. They must receive clear and conspicuous disclosure of the text messages they will receive from you, and agree to receive those messages to a specific phone number. When it comes to receiving consent, you can never be too careful. It's important to remember that customers giving you their phone numbers isn't the same as permitting you to text them. If you use an opt-in form, you should include the SMS program details and very clearly state that they are giving you permission to text them.

Revolve

Reply Y to confirm Revolve texts. Message and data rates may apply. Reply HELP4help and STOP2stop.

Y

The Double Opt-In

To make absolutely sure that you are in compliance with the law and that your customers *actually* want to receive SMS messages from you, consider implementing a double opt-in (Cordial requires that all clients implement a double opt-in automatically). A double opt-in requires that the customer confirm via text message that they would like to receive your communications. Double opt-ins are not required by the FCC or TCPA, but they are the closest a marketer can come to following the letter of the law. Having the customer confirm that they signed up for your SMS program shows additional intent to receive messages, and is a much stronger consent should the consumer “forget” that they opted in. Double opt-ins can be simple. It's as easy as sending an immediate follow-up message that reads: *Reply Y or YES to confirm that you want to receive SMS messages from [Business Name].*

SMS auto responder messages

To comply with all SMS regulations for auto responder messages, you must make sure that each SMS message you send has the following attributes:

1. Contains content expressly requested by the consumer
2. Has no other marketing or advertising information
3. Is a one-time only message
4. Is sent in response to the specific consumer request
5. A subscriber must be able to stop receiving messages from your company by replying to any messages with STOP, OPT-OUT, CANCEL, or UNSUBSCRIBE

The Opt-Out

Just as important as the opt-in, is the opt-out. There are two places where opt-out instructions are absolutely required by the FCC. The first is wherever a call to action asks someone to join your text program. Every location where you're opting customers into the program—whether it's a text to join, an opt-in form, or a sign-up sheet—you must include opt-out instructions. It can be as simple as "Text STOP to opt out."

The Privacy Policy & Terms and Conditions

Your privacy policy and terms and conditions are extremely important aspects of FCC compliance. These documents must include explicit language about how you plan to use subscriber information and provide information about how to opt-out of communications. Cordial will partner with your team to ensure your documentation is compliant but you should also work with a legal expert to ensure your language is airtight.

At a minimum your terms and conditions and privacy policy should contain the following information:

- Minimum age requirement
- Clause about standard messaging rates
- The short code(s) messages will be sent from
- The frequency of message sends
- How to unsubscribe
- What subscriber information will be collected
- How subscriber data will be used
- Where the service is available
- Supported message carriers
- Where to get help and support
- Notice that terms may change

Keep in mind that complaints often arise when customers forget they've signed up for text message marketing in the first place. You can avoid any potential issues by promoting your SMS marketing terms, conditions and privacy policy in as many places as possible.

Below are a few important places to place links to your terms and conditions and privacy policy:

- Your website
- Inside your physical business or on store signage
- On landing pages and/or preference panels used to collect opt-ins

Also remember that if you change your terms and conditions or privacy policy in any way, you should inform your subscribers via text, and ask them to reply CONTINUE or YES to confirm their continued consent. Not doing so could land you in a sticky legal situation if there is a complaint.

SMS Compliance Cheat Sheet

Telephone Consumer Protection Act (TCPA):

The consumer must have received “clear and conspicuous disclosure” of the text messages they will receive from the organization, and must agree to receive these messages to their specific phone number.

Federal Communications Commission (FCC):

Governing body that oversees the regulation of SMS marketing.

CAN-SPAM Act:

Forbids businesses to send commercial email messages to a mobile phone. CAN-SPAM defines commercial messages as advertisements or promotions for a product or service.

If sending globally:

EU: General Data Protection Regulation (GDPR):

GDPR defines “consent” as “freely given, specific, informed and unambiguous indication of the data subject’s wishes by which he or she, by a statement or by a clear affirmative action, signifies agreement to the processing of personal data relating to him or her.” It is very strict about how consumers give consent and opt out, so be sure to read the fine print. Making it easy to opt out is one of the most important aspects of GDPR compliance. That means including an opt-out clause in every message and on your website. *Note: Cordial does not support international text messages at this time.*

Building an SMS audience

Before you can deploy a successful SMS campaign, you need to build your audience.

Even if you already have your customers' mobile numbers from online orders or customer service support, you cannot begin sending messages to these users until they have expressly opted in to receive SMS communication from your company.

To begin collecting mobile phone numbers for your marketing campaigns, it's as simple as adding a field to your existing forms (don't forget to include compliance information we previously discussed). There are several ways to ask your customers for permission to send them text messages.

Here are a few examples:

- **Website:** SMS opt-in should be a clear call-to-action on your website.
- **Newsletter:** Make SMS opt-in visible on your newsletter.
- **Social Media:** Add a mobile number field to your Facebook page sign-up and an opt-in button for your followers to sign up for your SMS campaign.
- **Direct mail:** When you send coupons or promotional mail through the post, make sure instructions for SMS opt-in are printed on it.
- **Receipts:** Since many people keep receipts for returns and store policy information, the footer or back of a receipt is a great place to promote your SMS program.
- **Point-of-sale:** Using keywords in signage or having retail team members ask customers to sign up for SMS texts for promotions and sales can be very effective.

You got the opt-in. Now what?

When a new subscriber opts in to your SMS program, the first thing they receive is a confirmation message.

These messages are sent from Cordial automatically. To align with messaging best practices the messages should include:

Program Name:

Include your business name so customers know who's contacting them.

- **Example:** [Business Name] Mobile Alerts

Campaign Purpose:

What types of messages will they receive? Are you going to send special offers, announcements, or exclusive tips?

- **Example:** Sales, specials and news

Estimated Text Frequency:

Include the approximate number of texts customers will receive in a typical week or month.

- **Example:** Periodic or recurring messages

Message and Data Rates Notice:

Unlimited texting has become more common, but some users might incur fees for receiving text messages. Inform customers that standard message and data rates may apply.

- **Example:** Msg & data rates may apply



Chipotle: On National Avocado Day, guac isn't extra. Get FREE guac on any entree TODAY 7/31. In app or online: <http://chipo.tl/C6TzCN8W>.

Wed, Jul 31, 1:07PM

Here's a treat: Chipotle Rewards Members can get a \$4 Boorito today. Show up in costume to score. FOMO? Join: <http://chpio.tl/t7lgQZzn>

Thu, Oct 31, 11:15AM

Opt-Out Instructions:

Include instructions to unsubscribe in bold type. Words subscribers may use to opt out include STOP, END, CANCEL, UNSUBSCRIBE or QUIT. When a subscriber responds to any message with one of these words, you are required to remove them from your SMS marketing list.

- **Example:** Text STOP to cancel

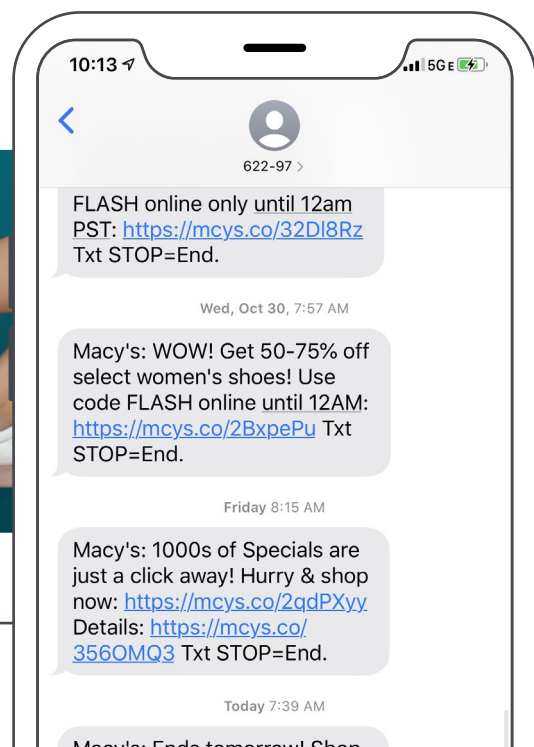
Help Instructions:

Let users know that they can respond to any text message with the word HELP to receive more information. When a subscriber does so, you must reply with a phone number or link they can use to learn more about the program or your business.

- **Example:** Text HELP for more information

So when we put it all together, your message could look something like this:

[Business Name] Mobile Alerts. Sales, specials and news send periodically. Msg & data rates may apply. Text STOP to cancel. Text HELP for more information.



The early bird does not get the worm

When deploying SMS campaigns, as with other channels, it's important to take timing into consideration.

Messages are most likely to be opened when recipients are awake and have their phone within reach. If you start sending coupon codes at 4 AM, not only will your open and engagement rates suffer, you'll probably end up with lots of angry subscribers and even some unsubscribes.

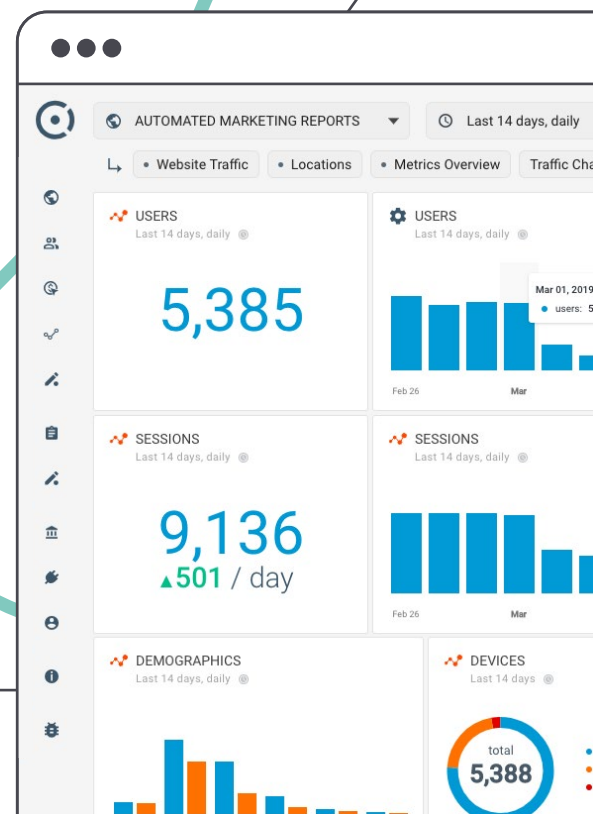
You can find out when your subscribers are most engaged by:

Checking your email platform

Your email platform should have detailed stats about when your subscribers open and click on messages. Granted, email is different from SMS, but this is a great starting point you can use to iterate on.

Reviewing Google Analytics

Check the "audience" tab on Google Analytics to see when your mobile web traffic is highest. If it spikes during certain times of the day, send your SMS messages right before or during these spikes and measure the improvements.



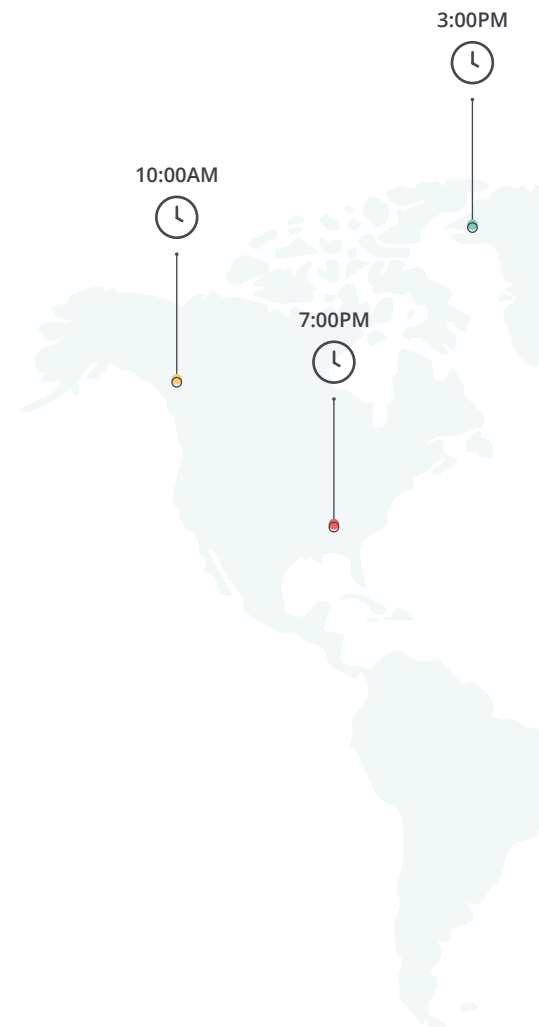
Remember to take time zones into account when you are scheduling your campaigns. Subscribers in New York are going to have different peak times than subscribers in Hawaii. Some messaging platforms are able to adjust send time based on subscriber location so the messages are always sent during peak time.

Better yet, use send-time optimization to automatically adjust when messages are deployed, based on when you have the highest engagement rate. This feature uses machine learning to adjust send time as more data is collected. You can also avoid this problem entirely by relying on triggered SMS communication, which deploys a message in response to a customer action or behavior.

Brevity is key

SMS messages are limited to 160 characters. Be mindful of this, especially when you are including personalization in your message tactics.

If your message is too long, it will be broken into two separate messages, which can be frustrating and confusing for the customer. With only 160 characters to use, ensure your message is to-the-point and delivers high value so your customer is motivated to respond positively. Customers respond more to materials addressed directly to them, so insert the subscriber's name when you can. You can also target your customer with more relevant texts based on their preferences and past shopping or browsing behavior.



Interact through individualized SMS experiences

Hopefully by now you're aware that SMS is an important piece of a successful, modern marketing strategy.

By incorporating Cordial SMS into your marketing technology stack, you can deliver personal, relevant, and emotionally intelligent messages to customers in mobile. All messages are personalized 1:1 based on real-time customer behavior and event data and can be connected to other channels so each communication is timely and relevant. SMS messages can be quickly and easily added to campaigns using Cordial's visual orchestration layer, Podium, and tracked at the message level using in-line campaign analytics.

Be there when your customers need you

Communicate with your customers at their convenience with personal, relevant messaging through one of their most-used channels of communication. Through customer behavior, limitless sources of real-time data, and interests, Cordial gives you the control to connect with your customers when they need you. Interact with your customers with intelligently triggered SMS, customer support, and order and delivery confirmations.

Build a strong and agile marketing tech stack

SMS communication is rooted within your complete campaign ecosystem through Cordial Podium for cohesive campaign management and orchestration. As you build your triggered experiences, you have the ability to incorporate SMS throughout your campaigns. Build a seamless cross-channel experience that adapts as customers take action with multiple tailored touchpoints.

Elevate the customer shopping experience

Use Cordial to send unique coupon codes, promotions, and wallet cards that can be directly added to the users phone and triggered when they are near your store location. When customers are ready to complete a purchase, you can remind them to use their gift certificates in their mobile wallet as they checkout. This creates an intuitive and cohesive experience for your customer as they navigate your site or app using their smartphone.

Impactful ways to leverage Cordial's SMS Channel:



Welcome new customers

and subscribers as they opt-in to your subscription list or loyalty program



Offer product recommendations

based on previous purchase behavior, demographics, and attributes



Help customers integrate their gift certificates into the mobile wallet for future purchases



Prevent cart abandonment

through personalized dynamic offers and coupons



Send tailored discount codes

and incentives by location (at the zip code level)



Integrate with loyalty program

and reward customers based upon loyalty level

Learn how Cordial can help you send a better message with SMS.

Request a personal demo at cordial.com/demo