



The SMS Playbook

How to integrate SMS into your
multi-channel marketing strategy



Understanding *the* Value of SMS

In marketing, minutes matter. If you have the ability to send messages with immediate visibility, you have an inherent leg-up in the race to get consumers to shop with you. Delivering the right message is a critical point in the customer lifecycle – and where the value of SMS becomes crystal clear. Yes, there are a ton of great marketing channels, but for time-sensitive messaging, few channels can match SMS.

To put into perspective the immediacy of SMS marketing, consider this: 80% of consumers cite that they check their notifications within five minutes of receiving a text.¹

It's easy to see why.

Few people are going to mute their notifications for text messages in the same way they mute social media platforms and other apps. If you aren't already leveraging SMS as part of your cross-channel marketing strategy, you have a prime opportunity to elevate the visibility of your messaging. And, if you aren't, we're going to show you how SMS can help you gain a competitive advantage – and make your customers really, really happy.

Of course with the power that accompanies SMS, it is equally important to pay careful attention to best practices, delivering only those messages for which consumers have explicitly opted into.

In this eBook, we'll cover these best practices, as well as practical ways to use SMS in your marketing, how to get started if you're new to SMS, and which benchmarks you should track on an ongoing basis.

¹ SimpleTexting. *The State of Texting & SMS Marketing in 2023*.
simpletexting.com/blog/2023-texting-and-sms-marketing-statistics

Key SMS Opportunities

A great addition to any cross-channel strategy, SMS opens the door to enhance both transactional and non-transactional customer experiences.

Make the buying journey seamless.

A recurring theme surrounding SMS is its ability to deliver in the moments that matter. This becomes particularly valuable in buying journeys, where today's customers expect timely updates. They want confirmation when they make a purchase, updates when products ship, swift notifications about delays, and so forth. To be clear, SMS isn't just for promotions – it's for staying by the customer's side and caring for them even after you've won them over.

MESSAGING OPPORTUNITIES

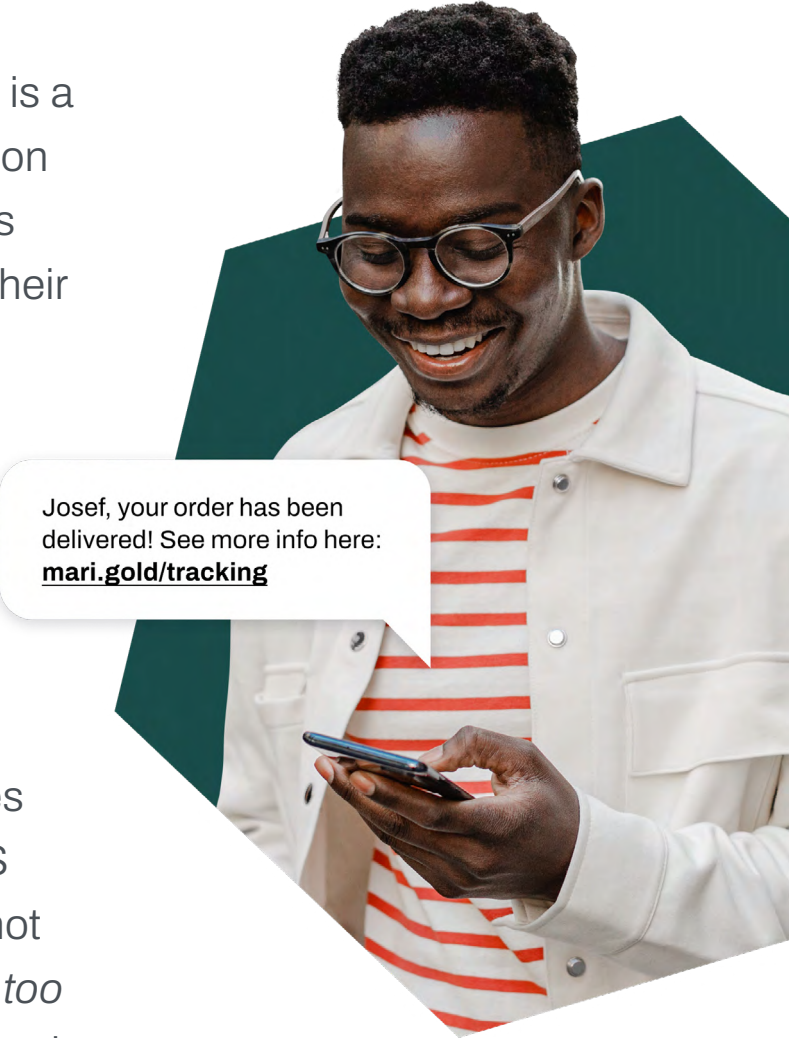
→ Order confirmation

Simple, easy and immediate, SMS is a great vehicle to deliver a confirmation message including your customer's order number and a page to track their shipping progress (or order status for service-based purchases).

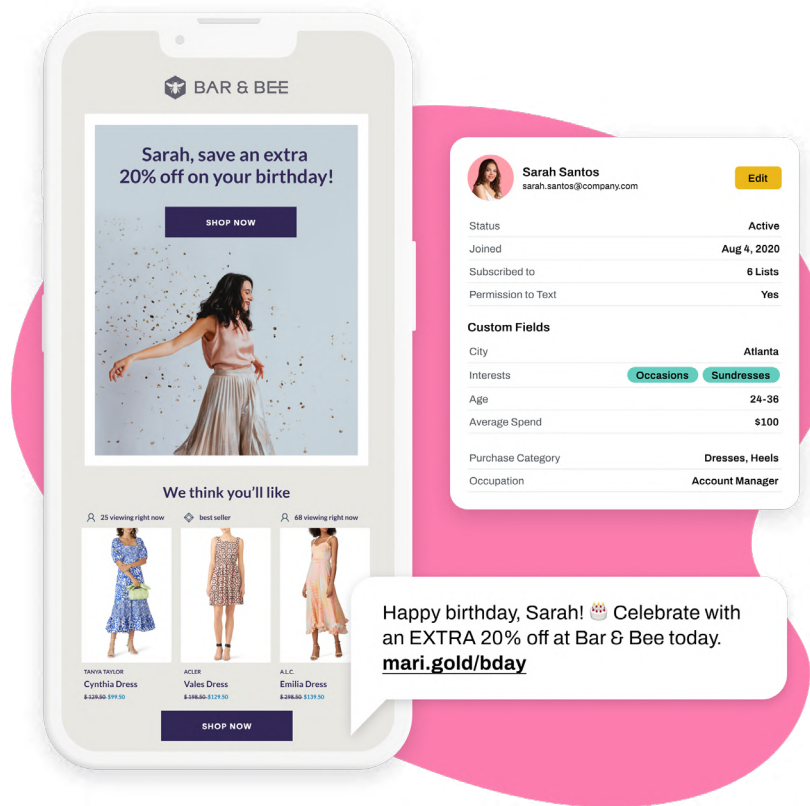
→ Tracking updates

Who *doesn't* constantly check tracking updates for something they're super excited about?

You can make your customers' lives a little easier on this front with SMS shipping updates. Just be careful not to overwhelm your customers with *too* many updates – messages for when the package ships, when it's close, when there are delays, and when it's delivered are a good baseline. You can adjust accordingly by probing for messaging preferences, which we'll discuss shortly.



Josef, your order has been delivered! See more info here: mari.gold/tracking



Complement your email marketing.

There's no doubting the power of email. In fact, our latest research shows that email continues to be the top marketing channel when it comes to consumer purchase frequency, with half of global consumers having made a purchase from an email in the last year alone.²

But there's also no doubt that a marketing strategy is even more powerful when email and SMS are united. SMS can bring quicker visibility to time-sensitive messages, where minutes matter.



MESSAGING OPPORTUNITIES

Flash sales and limited-time offers

For promotions, use SMS judiciously for those especially short-lived offers. Emphasize the time-sensitive nature of the offer to drive urgency.

Product re-stocks

If you have a hot product, you may find yourself creating in-stock alert forms for customers. Including an SMS opt-in section in these forms can help you build your SMS list, while giving prospective buyers a better chance at snagging hot products as they come back in stock.

Event reminders

A mutually beneficial messaging idea, SMS event reminders will help maximize attendance, while proving useful for event-goers who may genuinely forget if not reminded.

Appointment reminders

Similar to event reminders, appointment reminders are convenient for customers/clients, and will serve to limit the occurrence of missed appointments.

² Marigold. 2024 Global Consumer Trends Index. go.campaignmonitor.com/2024-global-cti-report

SMS Best Practices

ENSURE COMPLIANCE

You can NOT send an SMS message without someone opting in first. You need to explicitly ask for permission before sending any text messages to your audience – we recommend doing this via sign-up or subscription form. You should preserve an audit trail showing your customers have opted in to receive both promotional and transactional SMS marketing, and always include clear unsubscribe instructions. Campaign Monitor by Marigold has this built into our solution, so you'll never forget to include it.

IMPORTANT TO NOTE

The U.S. Telephone Consumer Protection Act (TCPA) also sets limits to the time in which you may send SMS messages. **You must avoid sending before 8:00 AM and after 9:00 PM in the recipient's time zone.**

GATHER PREFERENCES

It goes without saying that your customers aren't a monolith. Meaning, customer preferences depend on the person and the situation. Some will be okay with – or even adamantly appreciate – frequent SMS communications, while others may be less enthusiastic. It's good practice to hammer down on precise messaging preferences early on in your relationships. Include sections in preference forms for desired messaging frequency and messaging types, and follow them to a T. This will help to satisfy unique customer desires and mitigate unsubscribes.

Summer is here! Check out our sunny new menu specials.

About Menu Reservations MAGNOLIA'S

Get the latest from Magnolia's!

Sign up to receive weekly emails and SMS updates, with VIP discounts just for you!

Name

Email

Phone Number

I consent to receiving emails

I consent to receiving SMS

SIGN UP NOW

PERSONALIZE YOUR MESSAGES

Consumers crave personalization, and their favorite brands overwhelmingly deliver it. 85% say their favorite brand treats them like an individual. Not all brands have mastered personalization, though – a worrying 51% of consumers say that they’ve felt frustrated by receiving irrelevant content or offers from brands.³ Fortunately, there are some straightforward strategies you can deploy to join the ranks of favored brands.

→ Segmentation

If leveraging a cross-channel provider, like Marigold, you can pull your existing customer data to create segments for SMS. As you learn more about your customers, you can continuously refine these segments to deliver more relevant messages.

→ Triggered messaging

People interact with your brand in all sorts of ways. They sign up for in-stock alerts, they register for events, they book appointments and the list goes on. All of these actions represent opportunities to demonstrate that you value their engagement with your brand. To reduce manual workloads and deliver messages at precisely the right time, you can set triggers that automatically deploy messages for specific scenarios.



² Marigold. 2024 Global Consumer Trends Index. go.campaignmonitor.com/2024-global-cti-report

The image displays a smartphone screen on the left with the 'trend. retailer' logo at the top. The screen shows a personalized welcome message: 'Hi, Paul', 'Thanks for signing up!', and 'TAKE 20% OFF YOUR FIRST ORDER' with a 'SHOP NOW' button. Below the text is an image of a hand holding a brown leather oxford shoe. To the right of the phone is a customer profile card for Paul Jameson (paul.jameson@company.com) with an 'Edit' button. The profile card lists the following details:

Status	Active
Joined	Mar 12, 2019
Subscribed to	9 Lists
Permission to Text	Yes
Custom Fields	
City	Sydney
Interests	Formal, Vegan Leather
Age	24-36
Average Spend	\$500
Purchase Category	Oxfords, Boots
Occupation	Marketing Manager

Below the phone and profile card is a white speech bubble containing a red shopping bag icon and the text: 'Hi, Paul! Thanks for signing up! Take 20% off your first order. mari.gold/welcome'

INTEGRATE WITH OTHER CHANNELS

Combine SMS with other channels, like email, to create a more seamless, cohesive customer experience. Uniting SMS with your email platform reduces the need for multiple vendors and redundant processes, allowing you to spend less time doing manual tasks and more time refining your strategy.

TEST AND OPTIMIZE

Continuously test different variables to determine their impact on engagement. Variables to consider include offer type, text length, emoji use and send time. It's good practice to test one variable at a time to calculate its precise impact.

How to Get Started with SMS

New to SMS? Here's how to build awareness and gather opt-ins for your SMS program.

Make your sign-up and opt-in processes as seamless and easy as possible.

If it's too difficult your audience will give up. You can use sign-up or acquisition forms for new subscribers. When they sign up to receive communications from you, we recommend asking them for their mobile number, and whether they consent to receiving promotions via SMS. Because SMS is permission-based, you won't be able to immediately use your email marketing lists for SMS. Once opt-in is complete, send them an opt-in confirmation SMS message.

Welcome, Sarah! Msg & data rates may apply. Msg frequency varies. Reply HELP for help, STOP to cancel.

Thanks for joining us! We're SO EXCITED to have you here

Get started with 10% off your purchase with code: 063YQ9. Exclusions apply.

Shop now: amotrio.com/sale

Amotrio **A**

Let's stay in touch – here's our contact info. Just tap the card above to add our number to your contacts and we'll make sure you're first in line for all our biggest deals!

EXAMPLE OF OPT-IN:

- Company X incorporates a seamless UX starting with a double opt-in confirmation message, followed by a welcome message that includes fun emojis and a 10% off coupon code towards the recipient's next purchase.
- The next message asks the customer to “stay in touch” by adding their contact information by tapping on the card above.

This is a great way to add a more human touch with “Company X” coming up as the contact, as opposed to a shortcode.

Build awareness of SMS opt-in.

→ Ask your email subscribers

Create an SMS opt-in campaign, encouraging existing email subscribers to opt-in to your SMS messaging. To incentivize the opt-in, consider sweetening the deal with a special offer or discount.

→ Add an SMS sign-up form to your website

Ensure you're giving organic visitors, who may not even be email subscribers yet, a chance to opt-in to your marketing communications, including SMS.

→ Strategically deploy pop-ups

Create triggered pop-ups based on a visitor's clicks or movements to encourage SMS opt-in. Similar to your email campaign, consider sweetening the deal with a reward for opting in.

Stay tuned! Exciting announcement is coming this weekend.

About Discover Blog CHOW DOWN

A special offer

Sign up to receive 20% off your next purchase.

Name

Email

Phone Number

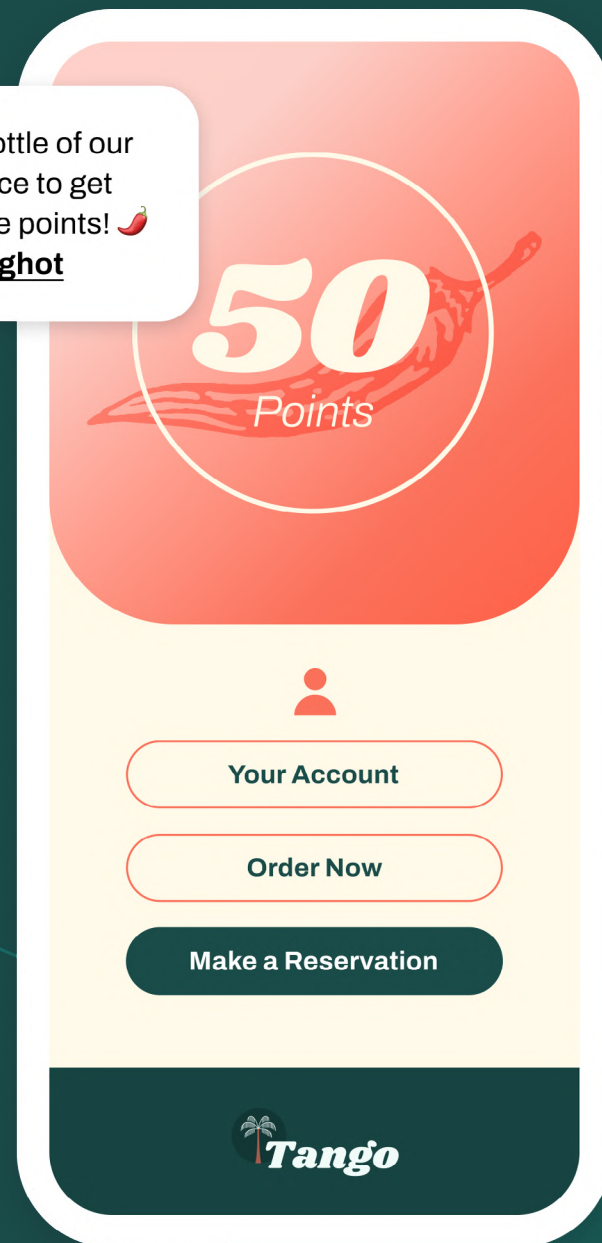
I am interested in personalized offers

I consent to receiving emails

I consent to receiving SMS

[Get My Discount](#)

Betty, pick up a bottle of our ghost pepper sauce to get 50% off + 2x spice points! 🌶️
mari.gold/blazinghot



Leverage the value exchange to drive opt-ins.

As we've alluded to, incentives are a key way to drive opt-ins. To get more granular, here are some specific brand offerings consumers find value in:

- Discounts or coupons - **91%**
- Loyalty points/rewards - **89%**
- Early and/or exclusive access to offers - **83%**
- A chance to win something - **81%**
- Unlocking content - **60%**
- Sense of community - **55%**⁴

SMS Benchmarks *to Know & Track*

Lastly, once your SMS strategy is off and running, it's time to set some benchmarks and track your ongoing progress.

Here are 6 KPIs you'll want to start tracking. With an advanced solution like Marigold, tracking these will become a breeze.

Delivery Rate

measures the percentage of your SMS messages that get delivered. Monitoring the delivery rate is crucial – if your messages fail to reach your recipients, your SMS campaigns will underperform.

DELIVERY RATE FORMULA:

$[\text{delivered texts} / \text{total sent texts}] \text{ multiplied by } 100$

Click Through Rate

measures the share of people who click a link in your SMS message. CTR is a good indicator of whether your CTA is resonating with recipients.

CTR FORMULA:

$[\text{click-generating texts} / \text{total sent texts}] \text{ multiplied by } 100$

Conversion Rate

measures the share of people who received your text and generated the desired outcome of your campaign.

CONVERSION RATE FORMULA:

$[\text{conversion-generating texts} / \text{total sent texts}] \text{ multiplied by } 100$

Unsubscribe Rate

measures the number of people who unsubscribe after receiving your SMS message. If your unsubscribe rate is high, try incorporating more personalization and lower frequency.

UNSUBSCRIBE RATE FORMULA:

$[\text{texts generating unsubscribes} / \text{total sent texts}] \text{ multiplied by } 100$

Campaign ROI

measures the amount of revenue generated from your SMS campaign, minus what you spent on them.

ROI FORMULA:

$[\text{revenue} - \text{costs} / \text{costs}] \text{ multiplied by } 100$

List Growth Rate

measures the share of new subscribers you have for your SMS list.

LIST GROWTH RATE FORMULA:

$[(\text{new subscribers} - \text{lost subscribers}) / \text{initial subscribers}] \text{ multiplied by } 100$

Conclusion

SMS is an incredibly powerful channel for delivering time-sensitive communications throughout the entire customer journey. When leveraged in conjunction with email, you'll be better equipped to deliver the right messages, to the right customers, at the right times.

Marigold unites email and SMS, allowing you to make your customer experiences even more seamless. Spend less time tinkering with disjointed data and campaigns, and more time curating personalized messaging cadences from one platform.

Connect with us today, and see how we can streamline your relationship marketing efforts.



Where *relationships* take root.

Marigold's approach to Relationship Marketing stands alone in a world of one-size-fits-all marketing technology companies. Our solutions are designed for your specific size, industry, and maturity, giving you the technology and expertise you need to grow the relationships that grow your business, from customer acquisition to engagement to loyalty. And, with a team of strategists that provide insights into what's working, what's not, and what's changing in your industry, you're able to maximize ROI every step of the way.

Great marketing isn't just about conversion, but true connection. Learn why 40,000 businesses around the world trust Marigold to be the firm foundation they need to help relationships take root.

Find out more at [MeetMarigold.com](https://www.meetmarigold.com)

