E-BOOK

2019 Guide to Customer Messaging

twilio

Strategy is crucial to every business's success

In today's digital landscape, the right messaging strategy is crucial to every business's success. With nearly 90% of consumers wanting to message with businesses, companies large and small can't afford to be left behind.

This 2019 Guide to Consumer Messaging is for organizations who wish to communicate relevant, personalized, and timely information through their customers' preferred messaging channel. From arrival alerts to support chat and much, much more, messaging is an effective way to make instant customer connections. Learn the best practices that will help your business messaging exceed customer expectations.

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Reach your customers where they are

These days, picking up a phone and calling someone can feel as old-fashioned as grabbing a pen and paper to write a letter. Even sending an email can feel outdated and clunky. Messaging is how the majority of people communicate digitally with each other today. Messaging is written communication sent over a variety of digital channels, from SMS to in-app chat, and newer channels that are emerging all the time.

Without a doubt, messaging is a part of life for billions of people today. Market research provider Vanson Bourne found that an average consumer has three messaging apps on their phone's home screen, uses three different messaging apps per week, and sends three messages per hour. By 2016, messaging was already larger than social media, with 3 billion users worldwide compared to 2.5 billion social media users. Since all mobile phones can send and receive messages, messaging provides users who don't have a smartphone or access to a computer with a quick, easy, and inexpensive way to communicate. All these factors combined have made messaging an even more universal channel than email.

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According to Vanson Bourne Research

Your customers are probably already communicating with their family and friends via messaging, from SMS to WhatsApp to Facebook Messenger, and they want to connect with businesses that way as well. Unfortunately, many businesses aren't

set up for messaging yet. Research shows that nine out of ten global consumers want to communicate with businesses via messaging and more than two-thirds prefer messaging over any other channel. In fact, Millennials prefer to receive messages from businesses through social media, mobile apps, and messaging apps at more than twice the rate of older customers. However, only 48% of businesses are equipped with SMS, and the percentage is even lower for other messaging channels.

For businesses looking to differentiate themselves, or who are merely trying to stay competitive, adding messaging into the customer journey is essential. Consider this: 81% of consumers say it's often difficult to communicate with businesses, and they want it to be easier. Messaging creates that ease. Phone calls seem to take too long and emails often go unread. In comparison, consumers respond to and read messages four times faster than email. In fact, 96% of messages are read within three minutes of receipt, and 90% within three seconds! It's quick and easy for customers to text back a confirmation to an appointment reminder, and it's reassuring for them to receive a notification saying their food delivery is on its way.

1.5 billion smartphones were shipped in 2017—each one capable of handling text messaging at a minimum.

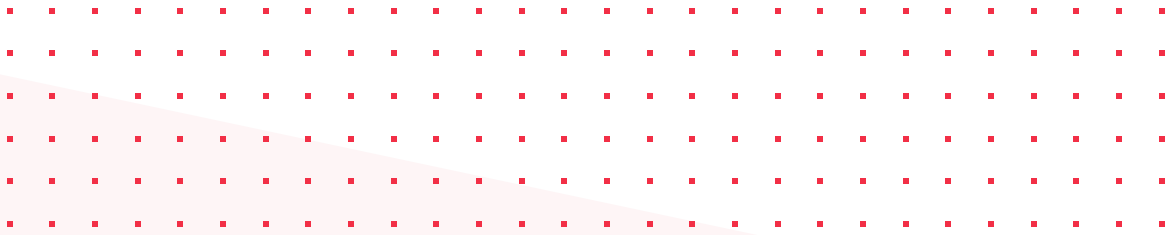
According to Gartner Research

Easy, satisfying customer communication isn't just a "nice to have" for businesses, it's imperative. Poor communication directly and negatively impacts a company's bottom line. Likewise, great communication can be a key driver of a business's success. Companies whose customers are extremely satisfied with their digital communications are 2.6x more likely to have revenue growth of 15% or more and 3.5x more likely to exceed their financial goals. With these stats, the potential for companies of all sizes is enormous.

According to Gartner, 1.5 billion smartphones were shipped in 2017 — each one capable of handling text messaging at a minimum. On top of that, popular messaging apps such as WhatsApp and Facebook Messenger are easy to download and use right away. Every year, new messaging channels become available, and each channel has nuances in terms of their capabilities and best practices. Not

only are new channels becoming available every year, but monthly active users are shooting through the roof. More and more of your customers are using these platforms on a daily basis.

Since SMS (Short Message Service) was invented in the 1980s, it's one of the oldest texting technologies and also the most frequently used. MMS (Multimedia Messaging Service) was built using the same technology as SMS to allow users to send multimedia content such as pictures, audio, phone contacts, and video files. Because SMS and MMS are transmitted over a cellular network, they require a wireless plan from cellular carriers to operate.



Timeline of B2C Communication Methods

Over time, more and more specialized messaging channels have launched. Push notifications are a form of one-way communication that can provide useful information and also direct users to your app. In-app chat lets your customers have conversations with your business from within your web or mobile app. WhatsApp, Facebook Messenger, LINE, and other messaging applications are often referred to as "Over The Top" (OTT) applications because they do not require a cellular network connection, and use IP (internet protocols) instead. To send and receive texts using these apps, your device needs to be connected to the internet, either over WiFi or via a mobile internet connection.

As we look to 2019, new interfaces are emerging that will continue to take the messaging experience to the next level, such as Rich Communication Services (RCS) and Apple Business Chat, which are delivered via a device's default messaging application.

Here are a few common ways brands use messaging today:

Commerce Notifications

To keep customers in the loop with proactive alerts and notifications before or after a time-sensitive business event such as appointment or bill reminders, ETA alerts, account updates, loyalty rewards, and delivery status.

Sales and Marketing

To increase engagement and create a sense of urgency that isn't achievable with email, such as promotions, coupons, time-sensitive surveys, and special sales delivered to users at just the right time.

Customer Service

To give customers a faster way to get questions answered, receive live support, and provide real-time feedback by messaging sales reps and support agents directly; can deflect as many as 40% of inbound calls.

Access Security

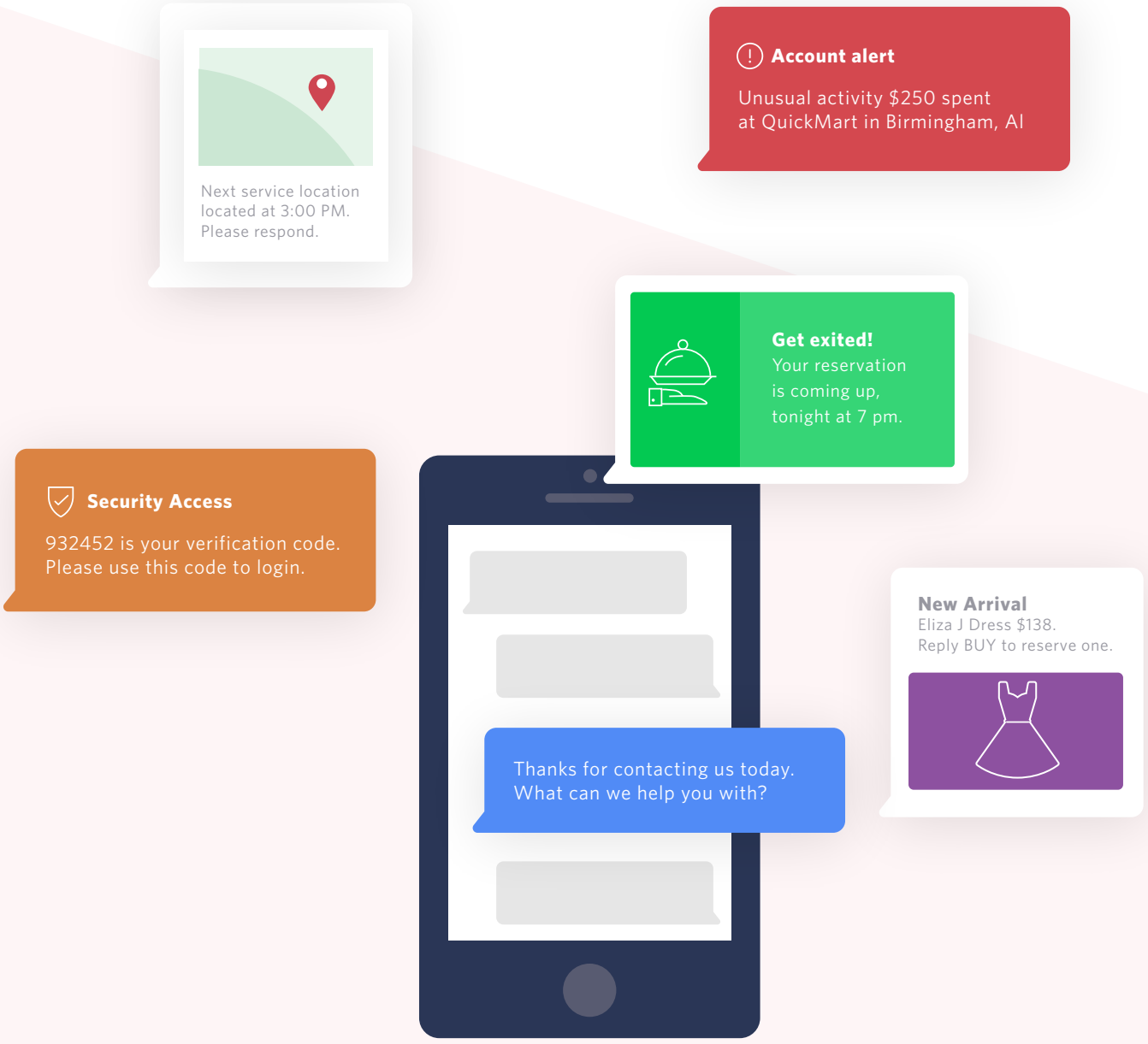
To strengthen a username and password for better security using two-factor authentication and dynamic codes for secure login, payment transactions, and more.

People Coordination

To reduce response and resolution times for coordinating people within or outside of the organization, such as team collaboration, scheduling shifts, sending dispatch notifications to mobile workers, or sending lead alerts to sales teams.

While not every channel or use case will make sense for you and your customers, the common goal of customer messaging is to deliver a customer experience that mimics how your customers would speak with a friend.

This e-book will give you an overview of the best practices you should be familiar with for the most popular messaging channels today.



CHAPTER 1

Messaging Best Practices (Regardless of Channel)

Before you dive into messaging your customers, you ought to decide on the type of messaging you want to enable. Is it one-way or two-way communication? This can be determined by asking yourself if you'll need to respond. Will it be a bulk or transactional message? To answer this, think about whether you plan to communicate with one specific person at a time or many people at once.

Your answers will determine the type of technology you'll use, so give this some thought.

Your next challenge is to decide which messaging channels you want to use: SMS, in-app chat, push notifications, social messaging apps like Facebook Messenger, or all of the above?

While these decisions are important, there are best practices that you'll need to keep in mind regardless of the channel or strategy you choose. Here are our top ten:

BEST PRACTICE 1

Get permission

One of the most important rules of business messaging is that **you must first gain permission from customers to contact them, regardless of the messaging channel.** Failing to do so can damage your brand and result in hefty legal fees. It's imperative that you are compliant and adhere to local laws and CTIA recommendations, which protect consumers from unwanted solicitation. Likewise, you must give users the opportunity to opt out. For example, you should include "Txt STOP to cancel" in your SMS auto-reply.

When you wish to communicate via SMS, ask your users to sign up to receive text messages containing special offers, new product updates, or other valuable information via an online form, contest entries, or by texting a particular keyword to a mobile number or short code. For in-app messaging, getting users to opt in for notifications is a crucial success driver for delivering your message. But many consumers opt out or turn off app notifications to avoid what they think will be a spam-like messaging. Some apps or app categories have an easier time getting users to keep notifications turned on. Recent data from Kahuna shows that for social apps, about 60% of users turn off push notifications.

The average global opt-in rate for messaging apps is 77%. Geographical preferences have a significant effect on opt-in rates. The most used app within a country will have a higher opt-in rate compared to others. For example, according to research from Vanson Bourne, WhatsApp is the most popular app in Singapore and 95% of WhatsApp users in Singapore have notifications turned on. Only 2% of the consumers there use LINE, of which only 66% have notifications opt-in. By comparison, a large percentage of consumers in Japan use LINE, of which 93% have notifications turned on. Only 1% of the consumers in Japan use WhatsApp, of which only 52% have notifications opt-in.

BEST PRACTICE 2

Communicate at the right time

When consumers contact businesses, it's primarily for help or information. They want quick resolution and value fast response times. In fact, consumers say responsiveness is the most important factor in their overall communication experience with a company. Yet, according to Lawless Research, 89% of consumers report businesses are too slow to respond, and 96% want companies to be more responsive.

Being more responsive will pay off; 79% of consumers believe that fast response times create a positive communication experience and 97% say they'll give more business to companies that promptly respond to them.

Communicating at the right time isn't just about communicating quickly. **When you're messaging your customers—instead of the other way around—aim for times your customers won't be busy, like before or after work, or during lunch hours.** Since messages are geared to inspire immediate action, it's not effective to send messages after hours. You also don't want to annoy your customers by waking them up too early or bothering them in the middle of the night. As a general rule, don't send messages before 9am or after 9pm. It's best to be aware of your customer's location, and understand the time zone differences that apply.

It's also important to limit how often you send messages. Nobody wants to receive an excessive amount of messages from a business. Be clear about how often you'll be messaging your subscribers and, if possible, limit it to two to four messages per month.

BEST PRACTICE 3

Communicate with the right information

One of the top three reasons customers contact businesses is that they are seeking information such as account balances, hours of operation, or details about a product or service. Quick and easy access to this information is essential. In fact, 68% of consumers value ease of access to the information they need from businesses. **Use contextual data to make your customers' interactions personalized and efficient, and make it easy for them to find the information they're looking for.**

When you're sending messages, keep in mind that customers respond more to materials addressed directly to them. A little personalization goes a long way, such as using your subscribers' first name or adding a conversational touch that reflects your customers' interests. You can also target your customers with more relevant messages based on their preferences. By segmenting your audience, you can be more intentional with your outreach rather than sending the same message to everyone.

Remember that when a customer hands over their phone number or username and agrees to receive messages, they're putting a lot of trust in you. It's your responsibility to show them the same level of trust and respect—that's what your customer relationships are built on. Don't send anything that even hints of spam, and refrain from sending messages without a true customer benefit. Ask customers about their preferences just as you would over other channels, such as email. Inquire as to when they would like to receive messages and what kind of information they want. Then customize your messaging to suit their wants.

BEST PRACTICE 4

Communicate over the right channel

Consumers are clear: they want options. They expect to interact with businesses the way they communicate with other people. And as newer communication channels become more popular, consumer expectations are shifting: 55% say that communicating with a business via their preferred channel results in a positive experience. People want to interact with businesses on the channels they prefer, and they want businesses to keep track of their shifting preferences.

This can only be accomplished by adopting an omnichannel communication strategy that provides consumers with an integrated customer experience. So, whether a customer is connecting with a business from a smartphone using WhatsApp, a desktop using Facebook Messenger, or on a mobile phone via SMS, the experience across multiple devices and channels should be seamless.

It's all too tempting for businesses to focus their efforts on a particular channel, especially if it's delivering results. However, **a single-channel strategy will never deliver the long-term engagement and retention of an omnichannel approach.** Throughout the customer lifecycle journey, there are times when your business might use push notifications and other times when outreach campaigns deliver better results using a social messaging platform. Each scenario is different. Only by understanding the relative strengths and weaknesses of each channel and keeping track of your customers' preferences can you optimize your messaging campaigns.

BEST PRACTICE 5

Boost your messaging intelligence

Messaging is more than just exchanging content between people. It involves a tremendous amount of intelligence to analyze content, deliver the message to the right person (or bot), and respond in the context of that interaction. Today, artificial intelligence (AI) powers chatbots that respond to customers and can be seen in apps like Microsoft Skype, Facebook Messenger, and Slack.

By 2020, Gartner predicts that customers will manage 85% of the relationship with an enterprise without interacting with a human. AI tools can make those interactions more human. **Capabilities such as intelligent routing, natural language processing, message sentiment analysis, and keyword spotting help your customers have a more personalized and efficient messaging experience without them even noticing.** AI can also improve agent conversations by anticipating customer needs and automating actions where possible. When contextual intelligence helps customers resolve common issues without needing to speak to an agent, agents are free to focus on higher value activities.

Ultimately, contextual intelligence can help you engage with larger numbers of customers without sacrificing the quality of the interaction.

BEST PRACTICE 6

Keep your message simple

When you send an outbound message, always be clever, engaging, and brief. Provide customers with an offer they can't refuse or with information that really matters. If you don't strike the right balance, you run the risk of opt-outs and your contact list rapidly shrinking. If done correctly, your customer may give your message the same attention level as a text received from a friend.

Messages by their very nature are informal. Most can be quickly read from a lock screen notification (or from a watch!) and immediately understood. There's no need for subject lines, intros, or signatures. Remember that most of your users will be reading your messages on their phone. So, **keep your messages short and to the point for maximum impact with minimum words.**

For marketing messages, be sure to have a clear call-to-action (CTA) and an incentive. For example, if you want customers to take part in a campaign that asks them to text a keyword to an SMS short code, make sure both the keyword and the short code stand out and aren't buried in the message. You'll also want to give users incentives to respond: if your special offer is only available to VIP text customers, let them know.

BEST PRACTICE 7

Engage in two-way conversations

Messaging use cases range from urgent notifications such as delivery status or service delays to convenience messages such as order confirmations or appointment reminders. Messaging is also an excellent channel to share information about new products and services, ask for feedback, or provide support. Even when you're sending outbound messages for which you aren't looking for a reply, keep in mind that for consumers, messaging isn't typically a one-way communication channel.

It's important to note that **85% of consumers not only want to be able to receive information but also reply to businesses or engage in a conversation.** Not all messaging channels can support a two-way dialog, such as push notifications. Nevertheless, the ability to conduct a two-way conversation should be incorporated into your messaging strategy.

By sending customers a message, you're making a personal connection; giving them the opportunity to respond in turn gives you valuable feedback on your products. Customers may tell you how much they love your brand, act on a coupon to make an immediate purchase, or start a productive conversation. To keep them engaged, you'll want to use an autoresponder to instantly and automatically send personalized, follow-up text messages, or have an agent (or intelligent bot) available to reply.

BEST PRACTICE 8

Integrate your messaging

When you integrate messaging smoothly into the natural flow of your business and customer relationships, any information you learn about your customers and their transactions can help you decide how best to reach out to them. When designing your messaging experience, you can add customer, order, or issue information from CRM, ERP, and other business systems. **Every bit of data should bring context to your customer conversations to improve the customer and agent experience.**

For example, consider a real estate business. If messaging is built into the CRM, a lead can be distributed instantly to the agent who is responsible for the home, who is available at the right time, or who speaks the same language as the buyer. The business can prioritize and determine which criteria is most ideal, factor in timing, and route the message accordingly. In this way, agents receive incoming messages with the context of who is inquiring and what property they're interested in. Then the agent can instantly communicate with the buyer using in-app chat or another messaging channel, like Facebook Messenger or SMS, if the buyer is no longer in the app.

Integrating mobile messaging into the context of customer conversations allows you to reach your customers the way they want to be reached. It provides a memorable customer experience, which can serve as a competitive advantage in the long run.

BEST PRACTICE 9

Measure what works

Smart businesses know how effective their messaging is and, by using the right tracking tools, can offer direct and measurable metrics that prove their ROI. If you are in sales and marketing, measuring your results allows you to easily determine which messages and promotions are working and which ones aren't, so you can continually refine your campaigns. You can also capture leads and responses for sales follow-up.

If you're using chat or messaging to provide customer service, you can measure handling time and experience time to see how efficient your agents are at resolving your customers' issues. Customer satisfaction surveys are easy to deploy over messaging and can help you begin to understand your customer experience.

When you continually measure the success of your messaging, you see what's happening in real time, so you know where your immediate focus needs to be. You use individual data to map to users' needs/wants and collective data to improve all users' experiences. Understanding the unique metrics that apply to your business will help you identify any problems and take swift action to fix them. With the right tools, metrics, and informed interpretation, you have the power to provide a best-in-class messaging experience.

BEST PRACTICE 10

Choose the right infrastructure

Whether you're deploying text messaging, push notifications, in-app chat, or Facebook Messenger, you want a messaging platform that can respond and evolve with the varying needs—and preferences—of your audience. Using one platform across messaging apps lowers ongoing maintenance, eliminates the learning curve, and speeds up the time to market.

When you adopt a building block approach, you get global reach, delivery intelligence, and reliability over both IP and carrier networks, all with minimal development effort. With an API platform like Twilio, workflows for apps like Facebook Messenger and WhatsApp are programmable through the same familiar Twilio API and development tools you use for voice, SMS, and video. You have a consistent experience when you build, scale, and operate your apps, no matter the channels of communication you choose.

This allows you to add messaging apps as a new channel without rewriting a ton of code. With Twilio's integration, you can send messages right into Facebook Messenger, WhatsApp, and many other messaging channels using a user's phone number if they have it linked to their profile. Twilio takes care of ongoing integration demands, so you don't have to worry about updating your code when messaging apps change their APIs.

CHAPTER 2

SMS

Short Message Service (SMS), also known as a text message, is a simple but powerful communication tool by which businesses and organizations send messages via text to receptive customers. SMS has become an essential part of our lives. As of 2007, users were sending more text messages than phone calls, and usage among all age groups continues to skyrocket. Businesses, too, increasingly rely on SMS to support customers, ask for feedback, and reward loyalty with special offers. All told, there are over 15 million texts sent every minute. That's 22 billion SMS messages a day!

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Because texting is so simple, and the messages are short by design, consumers love using SMS to engage with businesses. They don't have to sit on hold, take time out of their day to visit a business in person, or wait a long time for an email to be responded to. They can fire off a quick message in between everything else they're doing, and be guaranteed to get a succinct reply in no time. Businesses also love the channel; in addition to the consumer preference for texting, there's also its ubiquity, global reach, immediacy, and unrivaled open rates.

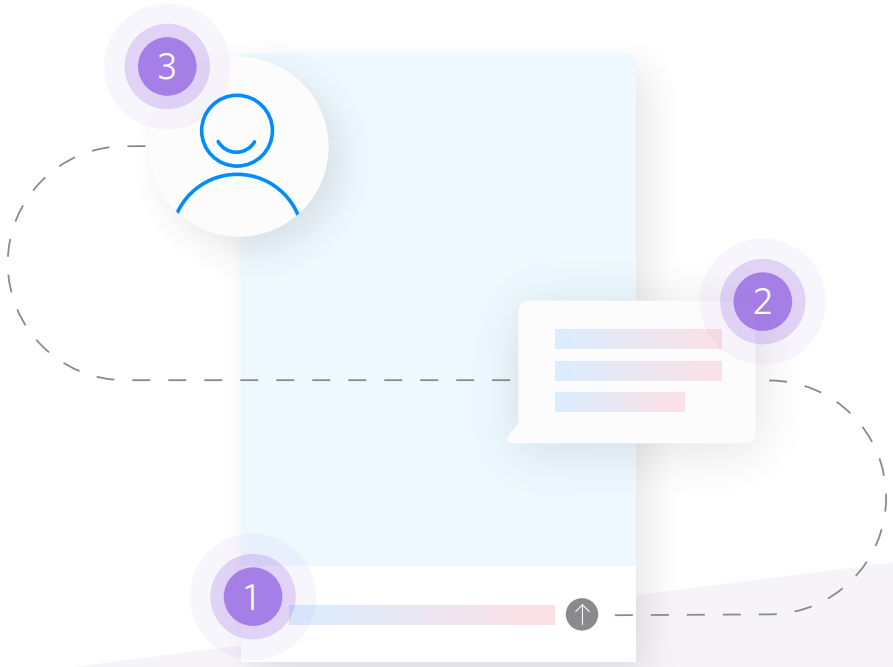
Since SMS is the one messaging function that's baked into every mobile device—pre-installed by default—this communication channel is a permanent fixture on everyone's phone. The diversity in use of messaging apps also makes native SMS (including iMessage and Android) the lowest common denominator for business messaging. In fact, 47% of consumers prefer using native SMS to communicate with businesses over all other messaging platforms.

Use SMS for marketing or support notifications and 2-way interaction

1. User sends an SMS to your toll-free support number

2. Business logic automatically resoponds

3. Agent can respond directly from within ticket



While commonly used for alerts, reminders, and customer notifications, bulk delivery of SMS messaging has more recently been embraced by marketing and sales teams to deliver surveys, rewards, special offers, and promotions. With some SMS platforms, you can engage customers even more by sending MMS (short for Multimedia Messaging Service) to send multimedia such as pictures, videos, calendar invites, and other attachments over text messaging channels. You can even send messages in local languages. Organizations in every industry are finding entirely new ways to engage customers with greater immediacy through SMS.

Before venturing into any form of SMS campaign, there are several best practices you should consider, in addition to the ten best practices discussed in the first chapter. These tips will guide you as you evaluate providers who can support your SMS communication efforts and elevate them over the long haul.

1. Consider a unique, brand-friendly short code

There are three main types of phone numbers that can send and receive SMS messages: long codes, short codes, and alphanumeric sender IDs. Long codes are 10-digit phone numbers, the type that a consumer or business would purchase from a landline or mobile carrier, and are generally the most common type of phone numbers you see. Short codes are a five or six-digit phone number specifically made for commercial use and mass mobile communications—and you'll typically want one when using SMS for larger-scale marketing purposes.

Alphanumeric Sender ID allows you to set your company name or brand as the Sender ID when sending one-way SMS messages to supported countries. Not all countries support this feature; the North American mainland countries of Canada, the US, and Mexico don't at this time. Alphanumeric Sender IDs may be up to 11 characters, including both upper- and lowercase ASCII letters, the digits 0 through 9, and space: A-Z, a-z, 0-9. Some countries may have additional requirements, such as pre-registration or limiting Alphanumeric Sender ID messages to be sent as transactional only (as opposed to promotional). Additionally, messages sent using an Alphanumeric Sender ID cannot be replied to directly.

Each country has its own telephone numbering protocol, and thus there are many types of long code phone numbers: geographic numbers, non-geographic numbers, and mobile numbers. North America is an exception where no such distinction is made, and the prefixes of numbers do not indicate their type. The most straightforward distinction between the two number classes as it pertains to SMS is that long codes are generally used for peer-to-peer use cases, while short codes are used for application-to-person use cases. Alphanumeric Sender ID numbers are only ever used for businesses.

Since short codes are shorter than typical phone numbers, they're easier to remember and type. Best of all, these numbers are individually approved by wireless carriers for marketing, so your messages won't be blocked. And you can send short code messages at a much faster rate than from regular long code phone numbers. Especially for time-sensitive offers, having the throughput (see below) of a short code is critical. Short codes are available in most countries.

2. Go global, but deliver locally

Choose an SMS provider that can scale and grow with your efforts, and one that can send the highest volumes of text and picture messages in the least amount of time. You also need a provider with an extensive carrier network to allow for global as well as localized phone numbers. And since nobody wants to receive a marketing text at 1 am, your provider should be able to automatically deliver your messages to your audience at the right time in the right time zone.

3. Check your throughput

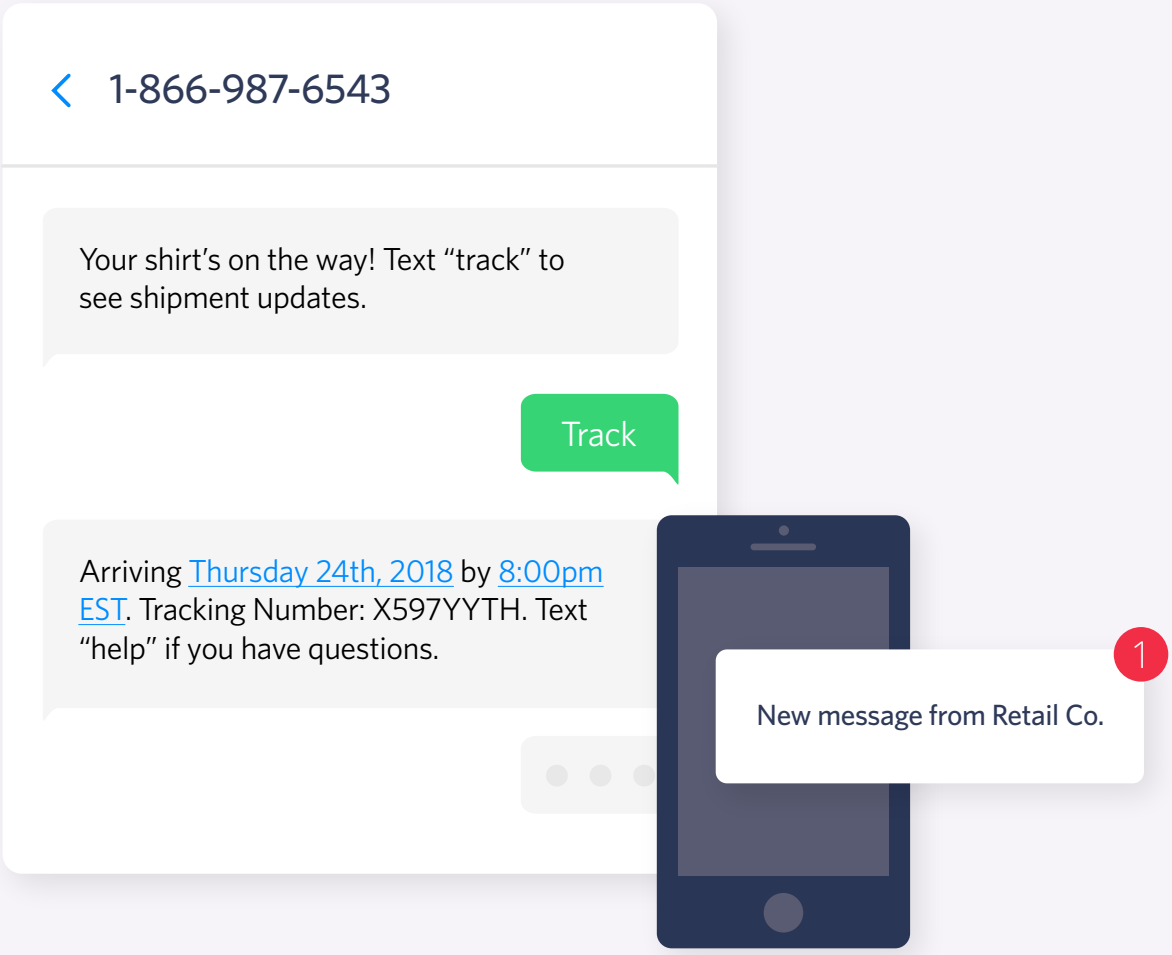
Before any messages are sent, evaluate your provider's "throughput": the number of messages your provider can send per second (often referred to as 'mps'). Emergency alerts, for obvious reasons, should be delivered with top priority. On the other hand, it's alright for certain marketing campaigns to be delivered over the course of several hours. If you need to deliver 100,000 messages simultaneously, for example, your provider must be able to accurately queue these messages and have the ability to dequeue them at a rate equal to the available throughput. In this example, if your provider offers 10 messages per second, it will take 10,000 seconds or 2.7 hours for all messages to be delivered. Bottom line: know the capacity your provider can handle.

4. Ensure messages are being sent to SMS-capable phone numbers

When running a bulk SMS campaign, it's conceivable that some of the numbers on your list are landlines or VOIP numbers incapable of receiving SMS. Messages sent to these numbers will not be delivered, but depending on your working agreement with your provider, you may be charged for them regardless. Most SMS providers only check if the number has a valid format; they do not check if it is capable of receiving SMS. Find a provider who does (and has tools to determine number type).

5. Manage customer responses

SMS is such an effective channel for engaging with your customers that it's important to anticipate—and effectively handle—responses to your messages. One way to do this is to provide a set of keywords in delivered text messages that customers can include in their replies. A keyword makes it easy to build automated response handling. For example, if you're running a promotion where the first 1,000 customers who respond to a text message get an exclusive deal, ask them to reply with a 'Y' if they want to participate. Make certain you're able to respond automatically and in real-time.

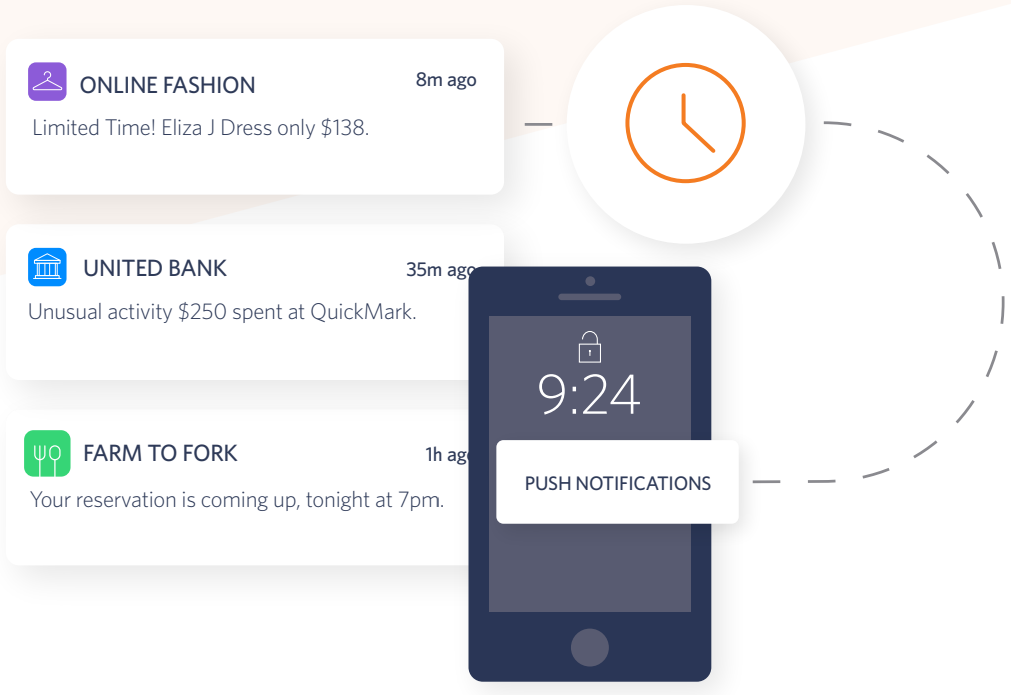


CHAPTER 3

Push Notifications

Push notifications are an important part of the mobile experience. Users have grown accustomed to having push notifications be a component of virtually every app that they use. If your mobile app uses push notifications to communicate with users, those notifications will send customers right back to your app. People who opt in to an app's push notifications are about three times more likely to open an app than those who opt out.

Note that mobile users without unlimited texting plans must pay for incoming texts and are likely to quickly opt-out of SMS communications. In contrast, Apple and Google don't charge an underlying cost for receiving push notifications on their iOS and Android operating systems. This makes push notifications a consumer cost-friendly method of one-way communication. And thanks to receipts and real-time status updates, you'll also know precisely when your notification has been delivered and read.



Push notifications do not require a particular application to be open on a device for the message to be received by the end user, so a smartphone user can see notifications even when their phone is locked, or an app is not running. However, the end user must opt in to receive push notifications from each application. An application usually makes the opt-in request on its initial installation, and the user typically has the option to grant or revoke consent for notifications at any time.

Finally, push notifications enjoy fewer technical and legal limitations than SMS. In the US, the Federal Communications Commission regulates mass promotional messages on email and SMS. Companies must follow the rules of the Telephone Consumer Protection Act (TCPA) and tread carefully when delivering text messages to users who haven't opted in. SMS content is also limited to 160 characters. Neither limitation applies to push notifications, making it a good channel for promotional messages. Since push notifications are entirely opt-in/opt-out, they may help reduce the risks of potential litigation.

The downside of push notifications is that they are not enabled by default when a user installs an app. A customer will have to agree to receive them the first time they use the app, or go back and subscribe to them later. While it varies across app categories, 40% or fewer of people enable push notifications.

Push notifications also pose some unique challenges. Making sound business decisions around what, when, and how frequently to push is critical to relevant and appropriate communication with your customers. Follow these best practices for better results and engagement:

1. Choose your timing wisely

Respecting time zones and sleep patterns, as well as user engagement habits, can go a long way toward providing useful notifications.

2. Personalize your messages

Target your push notifications to user segments and personalize your messaging for specific users to help ensure you aren't flooding people with unwanted messaging. The goal of push notifications is to provide value to your end users, not just to provide marketing value to your business.

3. Make your notifications rich

Take advantage of rich push notifications for better engagement. With these messages, apps can add gifs, buttons, audio, and more to their messages, regardless of the underlying carrier.

4. Use push in tandem

Incorporate push campaigns alongside your communications on other channels, like email or in-app messages. When you diversify your outreach across platforms and devices, you can better serve and delight your customers.

5. Track your results

If your push provider is an integrated marketing platform, you'll be able to track downstream conversions rather than just surface metrics like click-through rates. Metrics such as open rates are easily trackable through push notifications, making them a good fit for intricate campaigns.

CHAPTER 4

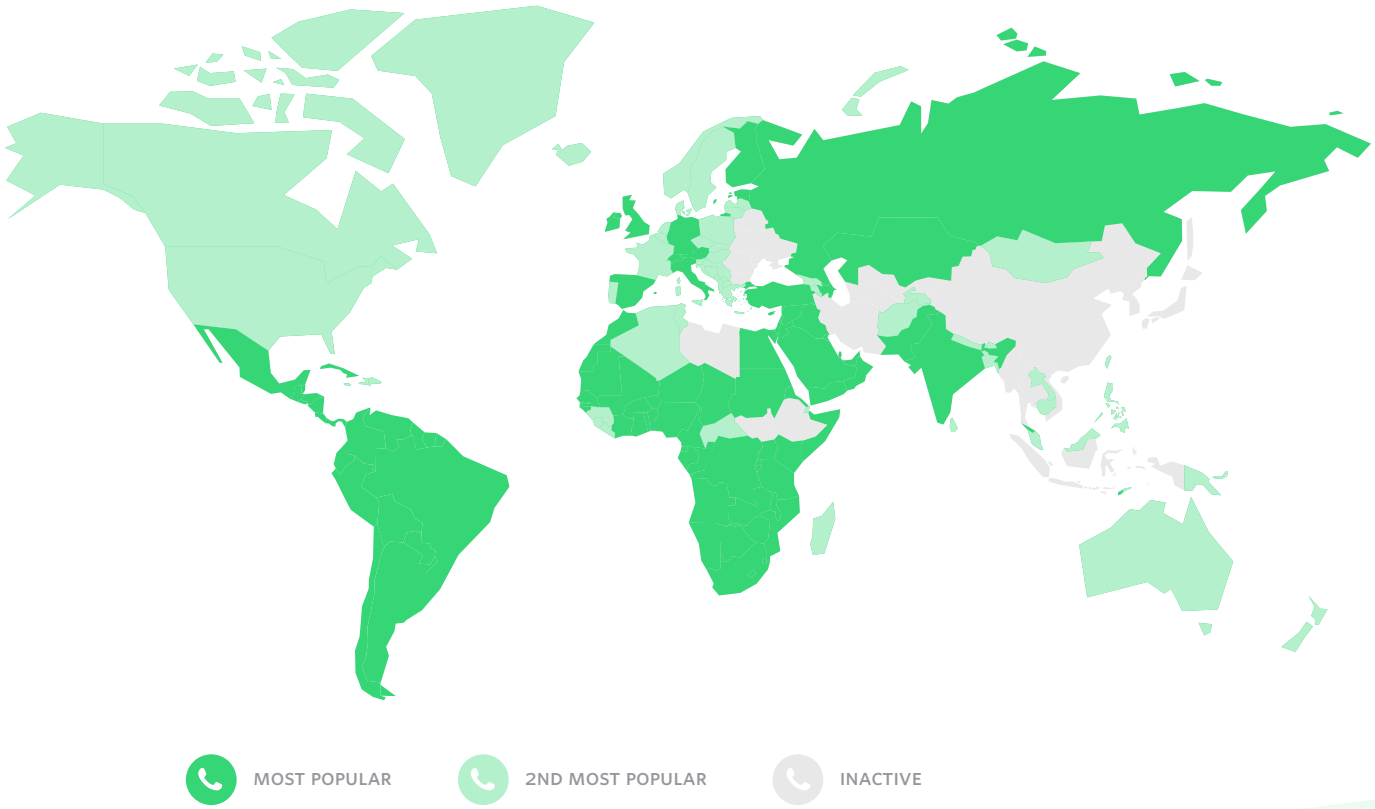
WhatsApp

Texting has exploded over the last decade to the point where we're currently witnessing over 6 billion SMS messages sent daily in the US alone. One of the reasons SMS is so prevalent in the US is that most carriers offer plans with unlimited texting, making SMS free or nearly free to use. With no significant costs to hold them back, we're seeing US smartphone owners aged 18 to 24 send an average of 67 texts a day.

Unlimited texting plans are less common in other parts of the world. This is the primary reason why free messaging apps like WhatsApp have gained such a significant foothold in these markets. WhatsApp, the messaging service acquired by Facebook for $19 billion in 2014, is by far the most popular messaging application in the world today—with more than 1 billion people using it at least once a month. Person-to-person SMS usage in countries like India and Brazil—where mobile operators rarely offer unlimited texting plans—has been largely replaced by the free-to-use WhatsApp. More than 1.6 billion people use WhatsApp in over 180 countries, sending more than 60 billion messages every day.

Apart from its popular use for personal communication, WhatsApp is also widely used for business messaging. With WhatsApp, companies create 'Business Profiles,' a unique, fully-branded business identity. This allows you to provide specifics like email and phone contacts, social media links, store addresses, website URLs, and suitable business details or offers. More importantly, your WhatsApp Business Profile gives you the opportunity to inject your brand personality with every customer interaction. And because WhatsApp verifies all business accounts, your customers are assured it's not an imposter on the other end when they opt in to connect with you.

WhatsApp usage among smartphone users



The best reason to use WhatsApp for business is that many of your customers are probably already using it. If your customer base is global, or if your customer travels globally, know this: as of early 2018, WhatsApp is the number one messaging app in 104 countries. And it has the highest smartphone penetration rates—as high as 95% in some of those countries. That popularity is unrivaled in Latin America, Europe, Africa, and Asia, with the exception of China who tends to prefer WeChat for business communications. If you want to tap into a more global market, WhatsApp should absolutely be in your communications portfolio.

Here are the key best practices to keep in mind when messaging your customers on WhatsApp:

1. Reach out to known users

Most people dislike receiving messages from unknown numbers, and in WhatsApp, where your customers communicate with their friends and family, an uninvited message could feel like an invasion of privacy. That's why you should only use WhatsApp to connect to known customers/users rather than reaching new users.

2. Be informal

WhatsApp is where many consumers interact informally with their friends, so trust and creativity in your business messaging are essential. Your campaigns should reflect (and respect) the personal tone of this channel.

3. Get creative

Because WhatsApp enables multimedia communications—think photos, documents, videos, slideshares, and more—brands have the freedom to be creative with their conversations. Moving beyond a simple text or email, you can infuse your brand ethos in uniquely new ways to make even more engaging customer connections.

4. Create a trustworthy profile

Because Business Profiles are mandatory, your WhatsApp branded business identity serves as the familiar face that greets users when you message them, increasing their trust in you and their loyalty to your business.

5. Talk back

While WhatsApp serves as an ideal channel for notifications like delivery alerts, purchase confirmations, and customer support, it also allows a more direct way to have two-way conversations with your customers. Your customers may use WhatsApp to research products and services, get reviews and consultations, make a payment, file a complaint, or book (or reschedule) a service call—all without having to phone, email, or even visit a brand's website. It's important to have a friendly agent ready to assist on the other side of the message.

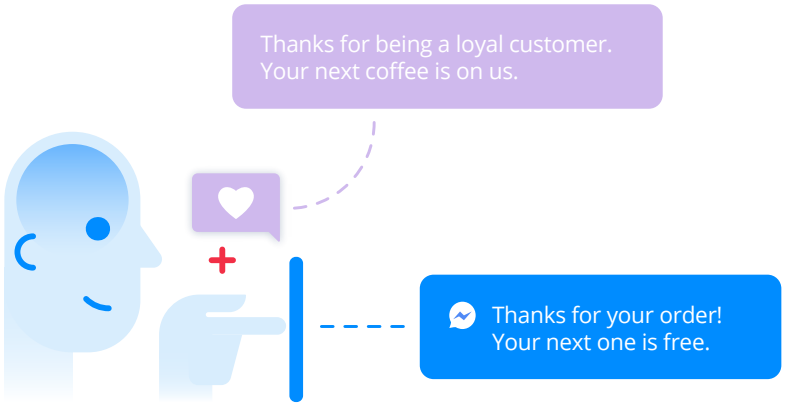
CHAPTER 5

Facebook Messenger

With 2 billion monthly active users, Facebook is the world's largest social media platform. If you're wondering whether you should engage users through Facebook Messenger, consider that Facebook's standalone Messenger App has over 1.3 billion monthly active users. It's becoming an increasingly popular channel for consumers to interact with businesses, especially because Messenger is automatically integrated with every Facebook business page. In fact, businesses trade 2 billion messages on Messenger each month.

The platform's widespread use isn't the only reason businesses are embracing this channel. With Facebook Messenger Marketing, your communications are tied to individual Facebook accounts. That means your messages won't "bounce," and you don't have to worry about people giving you a "fake" Facebook account (the way they use made-up email addresses on your opt-in forms).

Another benefit to Facebook Messenger is that inboxes aren't as flooded as email inboxes. Since most people begin using Messenger to interact with family and friends, they're actual users of the service and probably already have push notifications enabled on their phone for when they receive a new message. It's becoming commonplace for consumers to jump from sharing funny memes and inspirational quotes with their besties to chatting with customer service, all in Facebook Messenger.



By communicating through Messenger, you're creating an easy and secure way for your customers to reach you, right from your Facebook business page. You can provide support, take feedback, give order updates, or anything else your customers need. To facilitate their expanding communications on Facebook Messenger, many businesses today are using chatbots. Chatbot usage is growing fast: as of December 2017, there were over 200,000 active chatbots on Messenger.

Chatbots enable you to create sophisticated, interactive messages that engage your audience where they hang out. Companies use conversational bots, trained within the context of the business, to help customers without human oversight. These "assistants" glean the context and intent of a customer's message and can take immediate action—with a natural, human-like response—for example by generating a ticket, appropriately replying to the message, proposing a callback from a live agent, or automatically routing the user to a chat window with a live agent for quick resolution.

For outbound messaging, you can use Messenger to reach people at scale with announcements, offers, and other relevant information, and then interact with each of them individually when you receive replies.

When you're ready to engage on Facebook Messenger, here are some best practices that will help you be successful:

1. Consider how your messages will appear

Compact messages are easier for people to follow. To keep the text short, send a few separate messages instead of one long one. To make messages more visually appealing, include images, tables, and charts along with, or instead of, text. Be careful though: consider how your image may be cropped when it appears in the Messenger bubble.

2. Reply right away with welcome greetings and instant replies

Messenger lets you set a customizable greeting that will appear the first time someone starts writing a message to your business. This greeting can provide any information you want people to have before they message you. You can also create an instant reply so people will instantaneously receive a response thanking them for reaching out and letting them know you'll respond personally shortly.

3. Save time with saved replies

Your agents will probably answer the same question or provide the same information many times in a day. Messenger has a feature called Saved Replies that lets you write, save, and then reuse messages. These can be especially useful for customer service outreach.

4. Personalize your messages

Messenger provides customer information cards to help you glean information about each customer before responding. The context shows you where they live, their local time, order history, and more. This information helps you personalize your messages for each customer.

5. Use an Away Message if you can't reply right away

Whenever you're away from your computer or phone, Messenger has a feature called Away Messages that lets customers know you'll respond ASAP. Facebook scores each business with a responsiveness rating, and this feature will help you keep your rating high, while also setting the right expectations with your customers. Take advantage of Messenger's other useful tools, such as Appointment Reminders and Follow Up Message, to keep in touch at the right time.

CHAPTER 6

In-App Chat

Text and other forms of messaging may be common, but there are times when your customers want a more dynamic interaction with your business. In-app chat, also known as live chat, can be integrated into a web browser or mobile application, usually via a small pop-up module through which a visitor can have a written conversation with a live agent or chatbot in real-time. Live chat has the highest satisfaction levels for any customer service channel, with 73% compared to 61% for email. In fact, 79% of customers say they prefer chat purely because of the immediacy it offers compared to other channels.

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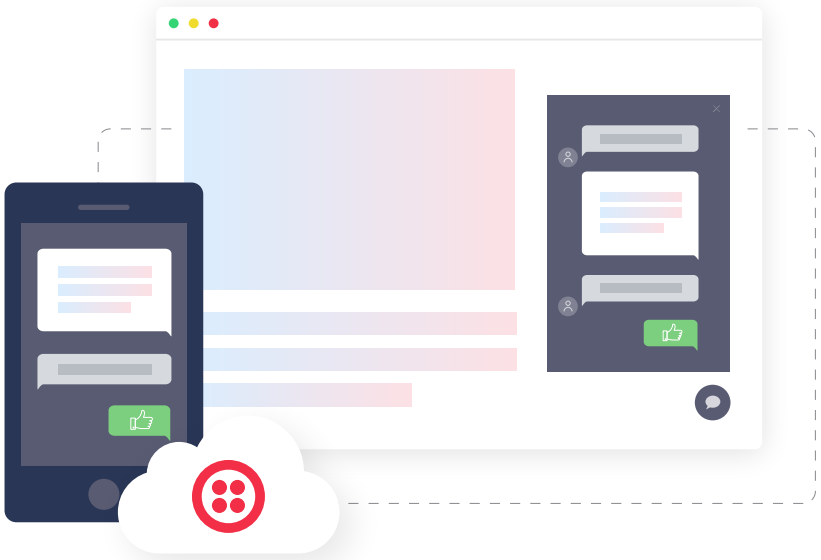
With in-app chat functions, you can reduce common delays with back-and-forth emails between your team and customers, and express real-time details or sentiments that are difficult to describe through text messages. Your agents won't waste time searching for a customer's individual information, as their profile is accessible from the app's backend. Likewise, your customers won't have to leave the app to talk to you or install any special software, as the chat lives within your website or application's ecosystem. In-app conversations are continuous, with chat history and message-read status synchronizing across mobile and web. Message activity can be stored in the cloud and updated in real time for service analysis or product feedback.



Depending on the specific use case, either a support representative (or bot) will reach out to a user to see if they need help with anything, or a person visiting the website or application will initiate the chat and the appropriate agent will join the conversation. Most in-app chat solutions enable you to display your representative's name and photo to help build rapport right away. Live chat typically does more than allow two users to send messages to each other instantly. Robust live chat systems include typing indicators, chat history, read receipts, and integration into third-party software (e.g., ticketing support issues, collecting and analyzing data, or routing customers to the most appropriate representative), all of which improve the chat experience for both the agent and the customer.

One of the most dynamic ways to connect with users, live chat is now an integral part of many companies' customer support process. Live chat is faster than email and more efficient than phone support since an experienced customer service representative can field multiple chat instances at a time. Intelligent chatbots can further expedite the process by providing instant replies in cases where human agents aren't necessary, and by giving contextual suggestions to agents when appropriate.

Live chat usually offers shorter wait times than other forms of support, and customers can easily multitask while waiting, which eases the pain of waiting for answers. Along with swift responses, a sense of privacy also increases customer engagement and satisfaction.

Here are some best practices for your in-app chat experience:

1. Be prepared with pre-written responses

Incorporating automated greetings and responses both decreases the amount of repetitive work a customer service agent has to do and provides instant contact for the user who needs help.

2. Show empathy

As with all excellent customer service, acknowledge their concerns or complaints, and show you care about their needs.

3. Be upfront about wait times

Let your customers know how long they'll need to wait for a response, and then follow through. If you need to research their case or look for the answer to their question, let them know what you're doing so they know what to expect. Likewise, if live chat isn't available 24/7, clearly communicate your operating hours or fallback to bots to answer common questions.

4. Give your agents insight

Because live chat is built into the website or application it serves, a good chat solution will provide the customer service agent visibility about the user who needs help, e.g., how long they've been on the site, if they are a new or returning user, or how many others are waiting to chat.

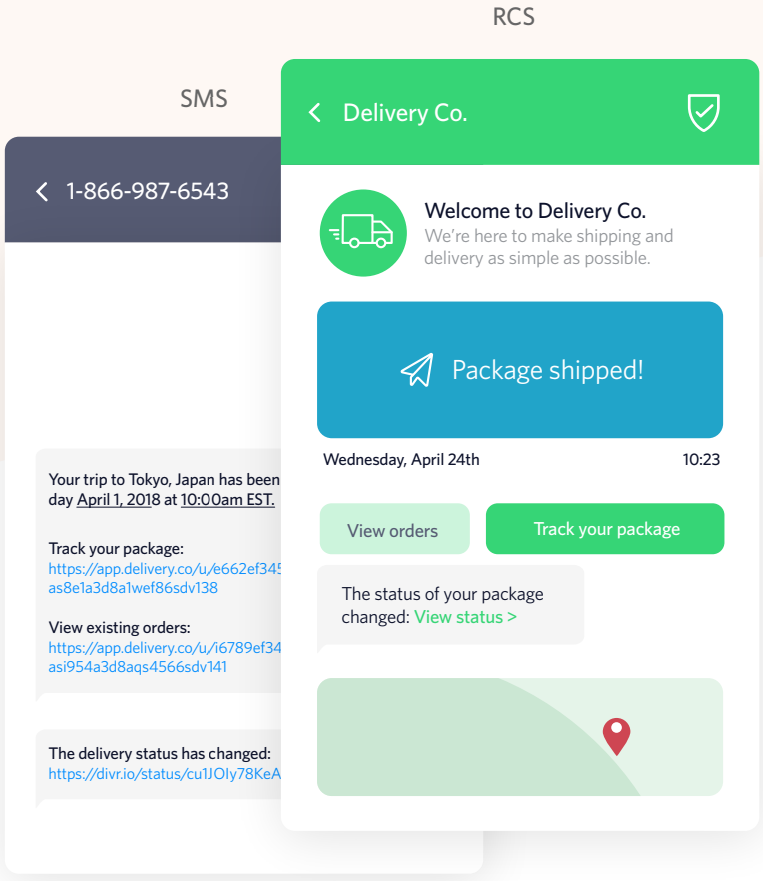
5. Analyze your results

In-app chat can give an organization insight into customer habits, trends, and pain points. Marketing, sales, and customer support teams can analyze the efficacy of their support team, and even extract data to aid business intelligence efforts.

CHAPTER 7

RCS

While SMS is widespread, it was designed for simpler phones and doesn't have the capabilities that modern smartphone messaging apps have today. SMS messages are limited to just plain text. RCS (Rich Communications Services) is an upgrade to SMS through a universal standard that allows companies to embed rich media, customize branding, and include suggested replies and actions, all sent directly to a customers' default messaging app. Businesses can include image carousels, send messages from a verified business address, provide end-to-end payment support, and track read receipts. And they only need to use a customer's phone number to do so.



In short, RCS makes text messaging as engaging as WhatsApp, Facebook Messenger, and other OTT messaging apps while providing the reach of SMS and MMS. Rich features like high-res photo and video sharing, mapping directions, location sharing, typing indicators, the ability to add and remove members to group chats, and so much more are delivered to a device's native messaging app irrespective of the cellular network the user is on.

So whether it's person-to-person (P2P) messaging between friends or application-to-person (A2P) messaging used for business purposes, RCS is changing the way everyone communicates. It is estimated that there will be 350 million RCS users by the end of 2018, and a billion in 2019. According to GSMA Intelligence, 86% of smartphones will be RCS-enabled by 2020. Businesses that want to stay relevant will need to embrace this new form of messaging.

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RCS's breadth of capabilities means you can provide branded, interactive, mobile customer experiences over a channel your customers already use and love. Since RCS isn't held back by the size limitations of regular SMS messages, you can share high-res images, video clips, and gifs for a multimedia messaging experience.

For example, a message from an airline reminding the customer to check in for a flight will provide an interactive check-in experience utilizing RCS, complete with a boarding pass, visual flight updates, and an airline terminal map, all within the messaging app the customer normally uses to send simple text messages.

Businesses embracing RCS messaging should note that Google upgraded the Android operating system to RCS, but Apple has not yet integrated the technology. With iPhone representing a 12.5% market share of the smartphone market worldwide, and a 34% share in the US, this poses a significant challenge for many

businesses. Until RCS messaging is available on all mobile devices, businesses will need to segment users and ensure that messages sent to iPhone users don't show up as error messages.

Since RCS messaging is new to the marketplace, consumer behavior and preferences around it aren't completely understood yet. However, with RCS messages delivered via the same default messaging app as SMS, the best practices discussed in Chapter 2 also apply to this next generation messaging standard.

In addition, here are some best practices and features you'll want to consider when leveraging RCS:

1. Fallback to SMS

While RCS has over 157 million active users, the audience continues to grow, and it's not yet globally available. This means that you need another ubiquitous channel to reach all the users who can't be reached on RCS yet. Make sure that your messaging provider provides SMS fallback, which ensures that if your users' carrier or device doesn't support RCS, your message will failover and be delivered via SMS.

2. Instill trust with branding and verified sender IDs

You can think of a verified sender ID as a hybrid between a verified account on a social platform and a shortcode for SMS. It ensures your users know it's actually you sending the message. The ability to add imagery or business details to your sender ID also extends your brand connection.

3. Structure the conversation

Instead of providing a keyword for response, you can use suggested replies and carousels to offer users a clear sense of what to do next. Payment integration, custom buttons, maps, calendar, and contact options add additional utility.

4. Engage your users

Rich card carousels bring your messages to life, improving engagement with app-like experiences that don't require your users to leave the app. You can include full-color, high-resolution graphics and videos in the message body, or include a loyalty card or ticket complete with QR code.

5. Contextualize resources

The next-generation features of RCS allow you to provide novel experiences, but that doesn't mean you need to make use of all of those integrations and features at once. Treat each message with the same care and attention you would your mobile application—deliver the resources that make sense for the interaction and add value for your customer.

CONCLUSION

Messaging Made Easy

How you reach your customers can make the difference between them reading your message and taking action, or ignoring your message and unsubscribing. People have moved from calling and emailing to messaging. The immediacy, convenience, and personal nature of business messaging give you the perfect opportunity to connect with customers around the world on the devices they use every day.

Businesses use Twilio to add messaging capabilities to their software so they can communicate the right information at the right time—at scale. Twilio Messaging APIs integrate messaging into your business communications in a variety of ways. Whether you want to send a basic SMS, incorporate in-app chat, share push notifications, or communicate through social messaging apps, with Twilio, you can message customers on multiple channels using a single platform.

Using Twilio APIs, your developers can grab the tools they need to give your web and mobile apps the power to exchange messages of any variety, all with minimal development effort. Twilio manages the complexity of the global carrier network to provide industry-leading message deliverability, allowing you to focus on creating a world-class customer experience instead of building and maintaining communication infrastructure.

Your all-in-one customer engagement toolbox.

Messaging Glossary

Alphanumeric Sender ID
Allows you to set your company name or brand as the Sender ID when sending one-way SMS messages to supported countries.

Application Programming Interface (API)
An API is provided by a service or program so that others may use the features and functions of the system. APIs are like a contract that describes how a consumer will make requests of the system, and what they will receive in return.

Application-to-Person Messaging (A2P)
Otherwise known as application-to-person messaging, A2P is a one-way SMS sent from a business application, and not an individual's mobile phone. When you send a text message to vote for your favorite performer on a televised talent show, you're using A2P messaging. Software applications use an API to send and receive texts.

Artificial Intelligence
The ability of a computer to mimic human cognitive skills such as learning and understanding.

Call-to-Action (CTA)
A statement or instruction that explains and incentivizes customers and potential customers to take action, such as subscribe to your marketing list.

Channel
Paths of communication, such as phone, email, SMS, and in-app chat.

Chatbot
A computer program that replicates conversation via internet messaging, sometimes used in e-commerce, contact centers, and customer service as a virtual agent to provide information on a limited topic.

Contact Center
An operation combining human, technical, and physical resources to field inbound and/or place outbound communications. Contact centers often handle contacts via multiple channels, including voice, email, chat, social media, and SMS. Contact centers deploy technological solutions and operational processes to distribute contacts to teams of contact center agents, often located in one or more locations.

Contextual Intelligence
Customers' personal information, interaction history, and all other aspects of the customer journey that is available to an agent during a service or sales interaction, in order to provide better, faster service. Contextually intelligent systems save customers from having to repeat themselves and ultimately contribute to superior experiences.

Customer Relationship Management (CRM)

A CRM system helps an organization improve its customer relationships, keep its customer contact details up to date, track every interaction, and manage their accounts.

Live Chat

Another common way to apply messaging to engagement is when it appears in web browsers or mobile applications like an instant message system, usually via a small pop-up module through which a visitor can have a written conversation with a live operator in real time. Also known as in-app chat.

Long Code

Ten-digit phone numbers, the type that a consumer or business would purchase from a landline or mobile carrier, and are generally the most common type of phone numbers you see.

MMS

Short for Multimedia Messaging Service, MMS is a standard way to send multimedia such as pictures, videos, and other attachments over text messaging channels. Marketers use MMS to send branded messages and advertisements that are more engaging than copy-based SMS.

Omnichannel

When all communication channels (such as phone, SMS, online chat, and email) are connected and integrated to provide a seamless customer experience.

Opt-In/Opt-Out

Because messaging is a permission-based medium, customers decide to join your list (opt-in process). If they become disinterested, they may unsubscribe from your list (opt-out process).

OTT Messaging

Short for over-the-top messaging, OTT is an instant messaging service or online chat provided by third parties, such as Facebook-owned mobile application WhatsApp. It is used as an alternative to text messaging services provided by a mobile network operator. OTT allows for the streaming of audio, video, and other media services directly to the consumer over the internet.

Person-to-Person Messaging (P2P)

P2P stands for Person-to-Person messaging. In simple terms, this is when two or more people communicate over text messaging. For example, when you send a text message from your phone to another person's phone, that's P2P. This can also include traffic that goes through an API to connect two people.

Push Notification

Push notifications are a form of one-way communication that can provide useful information and also direct users to your app.

RCS

Rich Communications Services, aka RCS, upgrades carrier messaging with features like sharing high-resolution photos and videos, adding appointments to calendars, mapping directions to businesses, browsing products, and more. RCS combines the messaging elements consumers expect from popular messaging apps like WhatsApp and Facebook Messenger with the ubiquity of SMS.

Short Code

Short codes are a five or six-digit phone number specifically made for commercial use and mass mobile communications—and you'll typically want one when using SMS for larger-scale marketing purposes.

SMS

An acronym for Short Message Service, SMS is an alternative way to refer to a text message. An SMS is generally sent over a cellular network. This protocol has been built into every mobile phone made since 2005.

Throughput

The number of messages your provider can send per second (often referred to as 'mps').

Thanks for reading.

Would you like to learn more
about what Twilio can do
for your business?

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