

The background is a dark blue gradient with subtle wavy lines. It features several geometric shapes and icons: a teal teardrop shape in the top left, a yellow teardrop shape in the top center, a red teardrop shape in the bottom right, a red gear with circular arrows in the top left, a yellow square with a cursor icon in the top right, a red person icon in the middle right, a teal bookmark with a star in the bottom right, and various white geometric shapes like squares, diamonds, and circles scattered throughout.

Marketing with SMS: Strategy & Compliance

Craig Balkin, SMS Analyst





Craig Balkin Act-
On SMS Evangelist

Experience & History with SMS

- 16+ years experience in the channel
- Deep channel lifecycle experience from compliance to execution
- Formerly principal @ cloudwi.re, a shared short code API that transacted nearly 2 billion messages
- Veteran of highly successful SMS campaigns from brands such as ConocoPhillips, Honda & artists such as Tim McGraw and Mariah Carey

How can you reach me?

Ask your AM or CSM to schedule a meeting with me to discuss your use cases and explore how you can add SMS to your customer engagement plans.

Why I'm Here

Compliance

- Global Compliance
- Carrier Best Practices
- Rule Change Updates
- Resources

Product & Support

- Product Knowledge
- Training
- Responsive Support
- Deliverability Monitoring
- Carrier Remediations

Sender ID Selection & Applications

- Short Codes
- Verified Toll Free Number
- 10 Digit Long Codes
- Alpha-Numeric Sender ID
- Global Messaging Support

Strategies

- Engagement Tips
- Use Case Identification
- Omni-Channel Messaging Orchestration
- Do's & Don'ts

Why You're Here

If I sent you a text right now you're likely to read it – fast! SMS is quick, powerful, and character-limited. This makes for an incredible channel to communicate with busy customers.

- SMS open rates exceed 96%
- >90% of SMS are read within 3 minutes of receipt
- SMS has an engagement rate 6-8 times that of email

Why Act-On SMS Marketing



45% of SMS campaigns generate a successful ROI, reaching over 50% when combined with other marketing channels such as email and social media.

Source: Smart Insights

- Act-On is the only MAP to offer fully integrated, native SMS marketing
- Leverage all of the powerful features of Act-On with SMS
- The right message to the right person at exactly the right time - at scale

Compliance Rules of Thumb

- Get written consent before sending SMS messages
- Keep a record and time stamp of opt-in
- Clearly post opt-out instructions
- Don't send SMS to opted-out subscribers
- Respect Quiet Hours and limit SMS traffic between 9 AM-5 PM
(Subscribers Local Time)
- Link to Terms of Service and Privacy Policy where applicable
- Be clear with the subscriber what SMS you will send them

Quiet Hours

What are Quiet Hours?

An EU and North American rule that is being adopted at the US State level limiting the time window when promotional SMS can be sent.

Florida's recent passing of bill SB 1120 is an example.

SB 1120 Highlights:

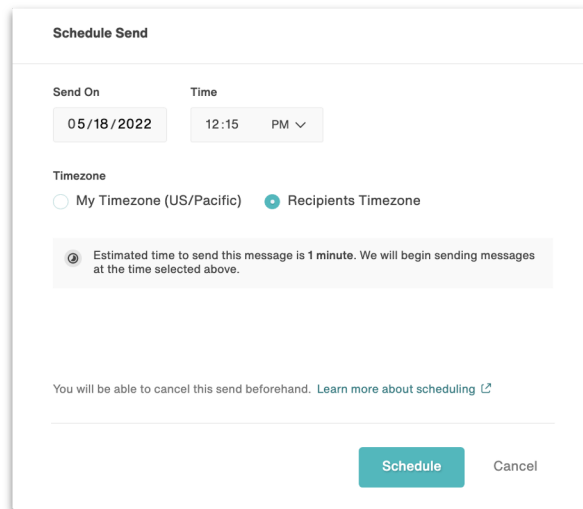
1. Could include non-promotional SMS
2. Send window is 8AM-8PM

When should I send to my customers?

- Monday through Thursday is the best time of the week to send promotional SMS
- Avoid sending on holidays unless necessary

Pro-Tip:

Send at lunchtime! Scheduling your promotional messages between 11:30 AM - 1:30 PM can increase conversion rates – your customers will be less distracted!



The screenshot shows the 'Schedule Send' interface. It includes a 'Send On' date field set to '05/18/2022' and a 'Time' field set to '12:15 PM'. Below these is a 'Timezone' section with two radio buttons: 'My Timezone (US/Pacific)' and 'Recipients Timezone', with the latter being selected. A notification box states: 'Estimated time to send this message is 1 minute. We will begin sending messages at the time selected above.' At the bottom, there is a note: 'You will be able to cancel this send beforehand. [Learn more about scheduling](#)'. Two buttons are at the bottom right: 'Schedule' and 'Cancel'.

Consent Disclaimers

Consent disclaimers should exist wherever your contacts are opting in. They should include:

- ✓ Sender ID & the Program Name (notification types)
- ✓ How to opt-out and how to get help
- ✓ “Message & Data Rates May Apply”
- ✓ Message Frequency
- ✓ “No Purchase Necessary to Participate”
- ✓ Link to Terms of Services and Privacy Policy

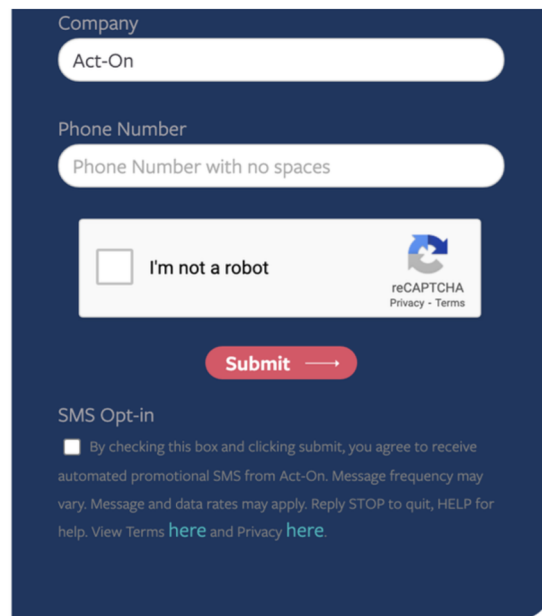
Compliant Disclaimer

Register Today

Register today for the next webinar in the **Power-Up series, Marketing with SMS: Strategy & Compliance on May 18, 2022.**

Are you curious about how to effectively use SMS marketing? Act-On's SMS Analyst, Craig Balkin, will walk you through best practices to incorporate this communications channel to your current marketing strategy. In this 30-minute session, you'll...

- Discover how to engage your customers with the right SMS message at the right time in a global market
- Learn how to grow your SMS opt-in list quickly and easily with forms that meet compliance guidelines
- Leave ready to drive event registration, emphasize training opportunities, and deploy logistical notifications by partnering SMS with email



The screenshot shows a registration form on a dark blue background. At the top, the 'Company' field is pre-filled with 'Act-On'. Below it is the 'Phone Number' field with a placeholder 'Phone Number with no spaces'. A reCAPTCHA 'I'm not a robot' checkbox is present, with a link to 'Privacy - Terms'. A red 'Submit' button with a right-pointing arrow is located below the checkbox. Underneath the submit button is the 'SMS Opt-in' section, which includes a checkbox and the text: 'By checking this box and clicking submit, you agree to receive automated promotional SMS from Act-On. Message frequency may vary. Message and data rates may apply. Reply STOP to quit, HELP for help. View Terms [here](#) and Privacy [here](#).'

- Compliant SMS opt-in form with digital signature
- Opt-in is recorded in Act-On with a timestamp

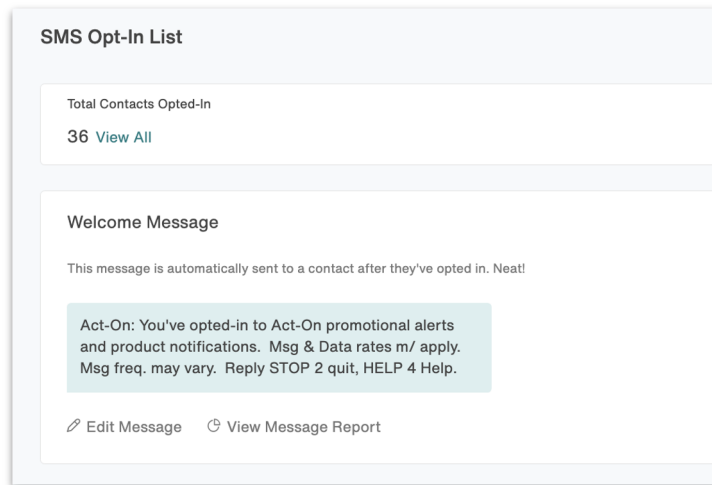
My customer opted in – now what?

Send an opt-in confirmation or welcome message to your customer. This will...

- Identify who you are
- Set the expectations of what you will be sending
- Complete the handshake with your subscriber

Pro-Tip:

Sending a confirmation or welcome message can reduce opt-out rates by 2-3 percentage points.



SMS Use Cases - Green Light

Promotional

- Important Sales/Product Updates
- Bottom Funnel Follow-Up
- Events Registration/Promotion
- Virtual Event Reminders
- Email not opened/engaged

Notifications

- Service (Logistical) Updates
- Process Nurturing
- Important Training Resources
- In-Event Updates
- Email not opened/engaged

SMS Use Cases - Spotlight

SMS is growing as an employer-employee method of communicating important information quickly.

- Important rules and legal requirement updates
- Hybrid office updates
- Important benefit information
- Important logistical updates

Pro-Tip:

Remember that prior express consent still applies to this use case.

Act-On: Please note important upcoming protocol changes as we prepare for ISO27001/SOC-2 certification.

<https://actn.ly/I/cDt/XXXXX>
XXX

SMS Use Cases - Red Light

Promotional

- Low Importance Promotions
- Price Reductions

Notifications

- Customer Surveys
- Non-Critical Updates

SMS & Automated Journeys

- Use SMS and email together in a coordinated omni-channel strategy
- Partnering SMS and email can optimize your marketing funnel and increase conversions up to 25%, depending on the use case
- Adding SMS to new or existing automations is easy with Act-On's Automated Journey Builder

“It’s as simple as picking a segment and sending. It’s glorious!”

Omni-Channel Recommendations

Email



Channel characteristics

- Lower visibility, longer opens
- Few content or character limitations
- High tracking accuracy

Recommendations

- Multiple Calls-to-Action
- Multiple links



SMS



Channel characteristics

- High-visibility, immediate opens
- Character-limited
- Limited tracking accuracy

Recommendations

- One Call-to-Action
- One link



Email & SMS



Recommendations

- Each channel should have a unique message
- Use Email to begin telling a story and SMS for the story's conclusion
- Optimize unopened or unclicked Email messages with SMS

SMS Mistakes to Avoid

Poor Timing



Unclear CTA



Multiple CTAs



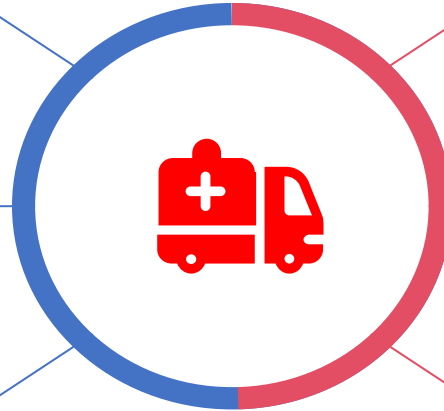
Trust Violation



Over Messaging



Duplicate Content



Conclusion

Key takeaways to remember as you plan your SMS program.

- ✓ Gain Prior Written Consent
- ✓ Communicate the type of SMS you are sending
- ✓ Unless urgent, send SMS at lunch M-T
- ✓ Don't over message
- ✓ Use SMS & Email together for higher impact



Next Week:

Product Showcase Webinar

Covering recently
released features
& our roadmap

You're invited

Remember to register for our
Act-On Product Showcase
webinar on May 25 at 10 a.m. PDT!

*Register via the Act-On login page
or in this webinar's follow-up email*



Thank you for joining me!

