Intermediate SMS Workshop

From Opt-in to Impact, how to scale an SMS Program

Clayton Mamele

Manager, Professional Services Iterable

Over the past five years, Clayton has onboarded hundreds of customers onto the Iterable platform, driving platform adoption and customer success across email, SMS, and mobile channels. He is known for his deep expertise in SMS and cross-channel marketing and his ability to create custom solutions for clients that drive business results.

Stevin Overholser

Senior Solutions
Consultant

Marisa Bloodgood

Senior Manager, Demo
Engineer & Solutions
Consulting

Derek Lau

Manager, Professional
Services

Today's Learning Objectives

Understanding SMS Program Maturity

Where are you on your journey with SMS as a channel and do you know what to prioritize next?

Learn to Build an SMS Subscriber List

How can you leverage the tools and data on hand to drive opt-ins?

Design Effective Campaigns & Journeys

Understand the elements that drive action and how to incorporate SMS into your customer communications plan.

Agenda

1:00 – 1:15	Introductions and Housekeeping
1:15 – 1:25	Defining SMS Maturity
1:25 – 2:00	Learn to Build an SMS Subscriber List
2:15 – 2:50	Design Effective Campaigns and Journeys
2:50 – 3:00	Learning Recap

Agenda

3:15 – 3:30	Introductions and Housekeeping
3:30 – 3:45	Defining SMS Maturity
3:45 – 4:15	Learn to Build an SMS Subscriber List
4:15 – 5:05	Design Effective Campaigns and Journeys
5:05 – 5:15	Final Q&A

Location Logistics

Bathrooms, Snacks, Drinks, Outlets, Stretch Break

Bottom Line Is….Take the time you need to for the things you need!

Session Info

Event materials will be available at the end of the session

We will have a portion of **time dedicated for Q&A** but feel free to ask questions for the Iterable folks walking around
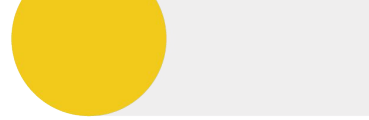
We want your feedback! Please be sure to fill out the post event survey in the follow-up email

Slido for questions

slido.com
2688692

SMS Program Maturity

SMS Maturity Model

STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5

SMS Maturity Model

STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5
INITIATION				
Ad Hoc Execution: SMS campaigns are sporadic and have no clear strategy or goals. **Essential Compliance:** Minimal adherence to legal requirements like opt-in consent but lacking systematic enforcement. **Limited Segmentation:** Messages are generally broadcast to all subscribers without targeting.				

SMS Maturity Model

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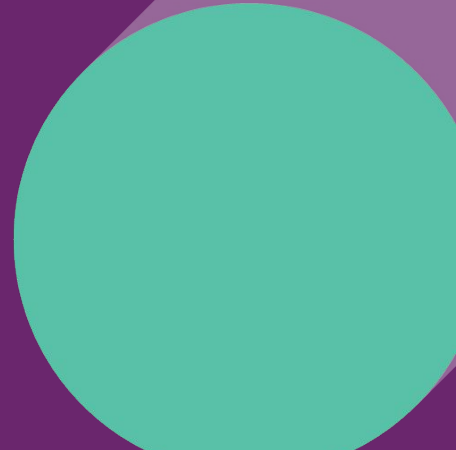| STAGE 1	STAGE 2	STAGE 3	STAGE 4	STAGE 5
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Group Experience

Let's get to know each other

- **A room full of marketers**
- Assume **10 years** experience
- **100's of years** of marketing experience in the room!
- Take the next **5 minutes** to introduce yourself to your table and discuss where you are in your SMS journey

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Building an SMS Subscriber List

UPLEVEL YOUR LIST BUILDING

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Enhanced Opt-in Techniques

- Single Opt-ins

- Double Opt-ins

- Text-to-Join Campaigns

- Smart Opt-in

Building Your Subscriber List

We recommend the following subscriber list building strategies for Your Company:
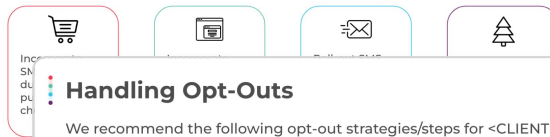
Handling Opt-Outs

We recommend the following opt-out strategies/steps for <CLIENT>:

Double Opt-In Policy

We recommend that you adopt a double opt-in policy based on these benefits:

(Double opt-in is when a company asks customers to reply "YES" via text to confirm that they want to be included in its future marketing campaigns)

Cleaner subscriber list. Double opt-in is a quality filter. Only engaged consumers who want to learn more about your brand and product will go through both opt-ins.

Better engagement. Generally, campaign metrics (opens, clicks) and sender reputation increases while deliverability issues decrease/are minimized.

Unambiguous proof. Customers that complain can be shown the double opt-in records of where they sent their opt-in text.

Overall, double opt-ins allow for complete transparency (especially with explicit consent) and ensure you're compliant with the law and not spamming customers.

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Single or Double Opt-in?

Single Opt-in

- Less friction for the end user to sign up
- Higher acquisition-conversion
- Grow the SMS list faster
- No partially opted in users
- Still within compliance

Single opt-in to alerts

Double Opt-in

- Less unsubscribes down the road
- Increased engagement for your SMS users
- Assurance that the user truly is interested in your SMS channel content
- Higher degree of compliance
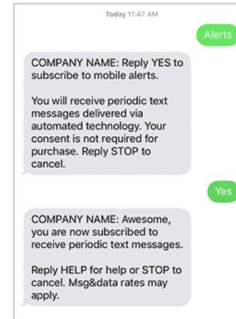
Double opt-in to alerts

Let's Build
Double Opt-in Flow

JOURNEY OVERVIEW: DOUBLE OPT-IN
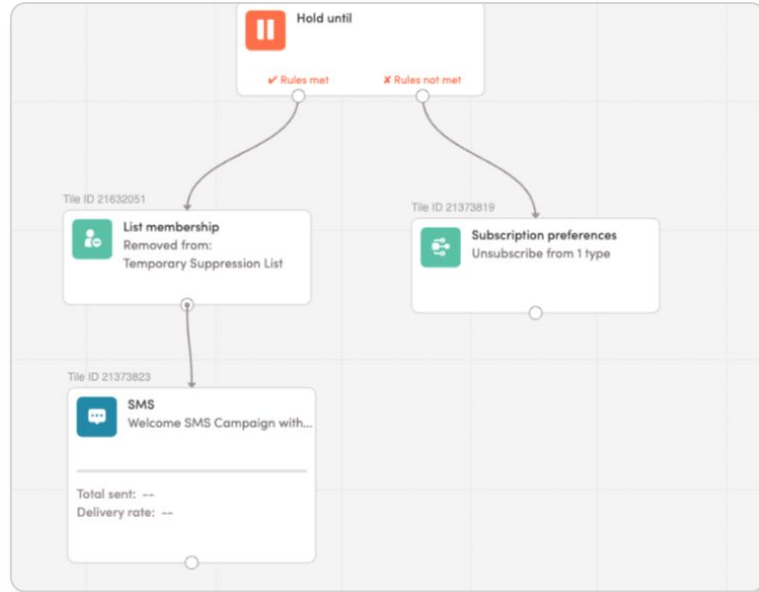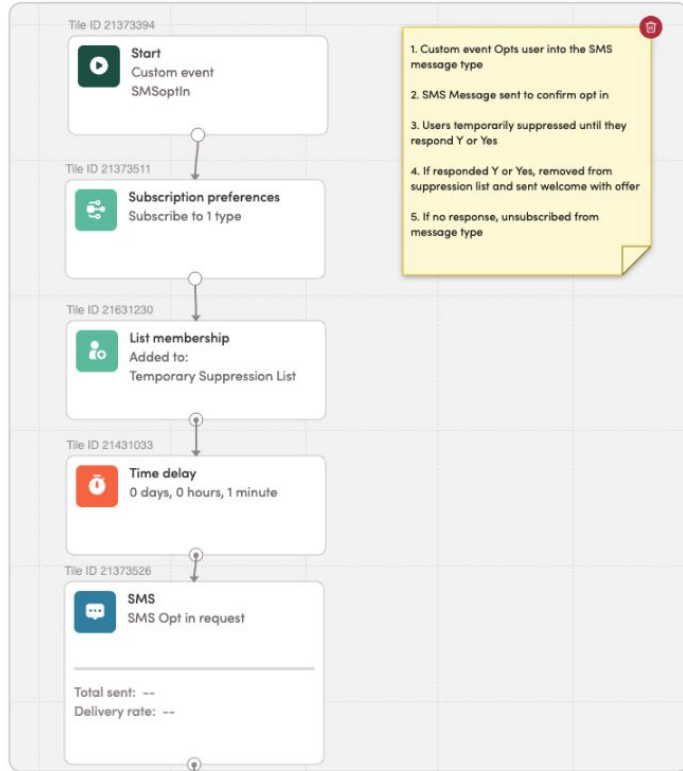
JOURNEY OVERVIEW: DATA USED

Events:

- Custom event - SMSoptIn

- couponCode

User Data:

- phoneNumber

- email

START TILE & ENTRY SOURCE – CUSTOM EVENT
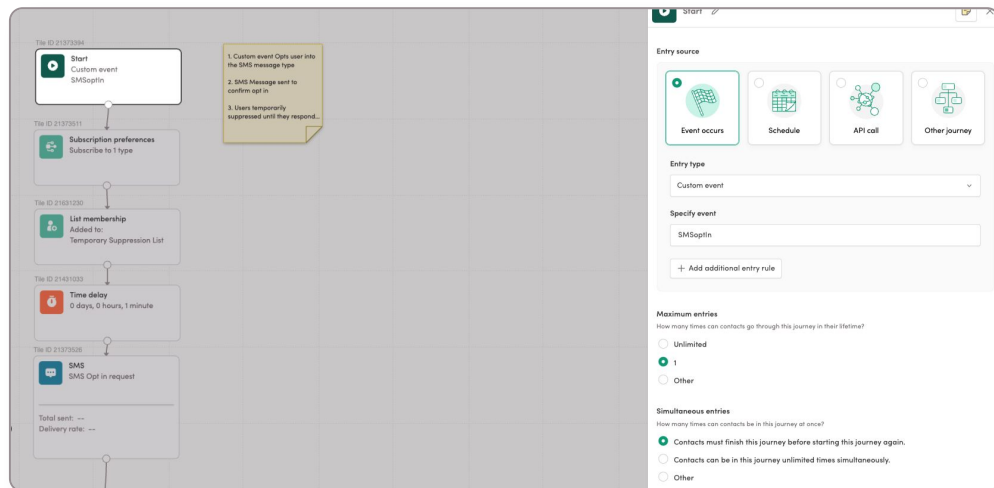
Entry Source:

- Event Occurs
- Entry Type: Custom Event
- Specify event: SMSoptIn

Maximum Entries:

- Enter once

Simultaneous entries:

- Contacts must finish this journey before starting this journey again

EXAMPLE CUSTOM (TRIGGER) EVENT

Example SMSoptIn Event:

```
Object:{
    SMSoptIn:{
        phoneNumber:"+13036767449"
        email:"emily.thompson@iterable.com"
    }
    eventName:"SMSoptIn"
    email:"emily.thompson@iterable.com"
    createdAt:"2024-01-23 13:05:36 +00:00"
    eventUpdatedAt:"2024-01-23 13:05:36 +00:00"
    itblInternal:{
        documentCreatedAt:"2024-01-23 13:05:36 +00:00"
        documentUpdatedAt:"2024-01-23 13:05:36 +00:00"
    }
    combinedRowText:"emily.thompson@iterable.com
    smsoptin"
}
```

- The main point of this event is to trigger (start) the journey.

- The name of this event in our example is SMSoptIn, however this can be whatever you prefer

ADD TO TEMPORARY SUPPRESSION LIST
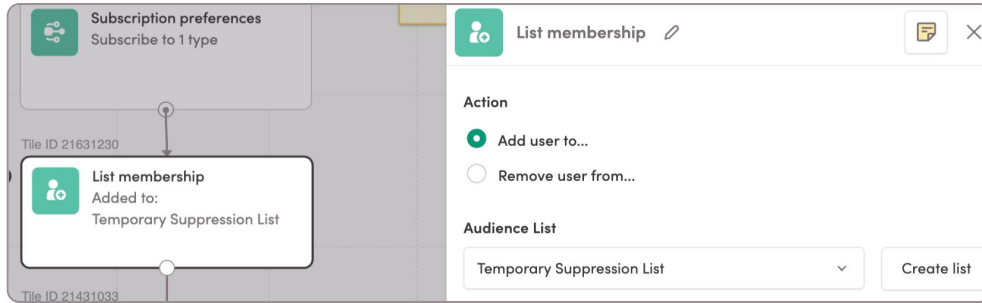
Adds all users who have subscribed to the message type to a temporary suppression list to ensure they cannot be messaged until double opt in occurs.
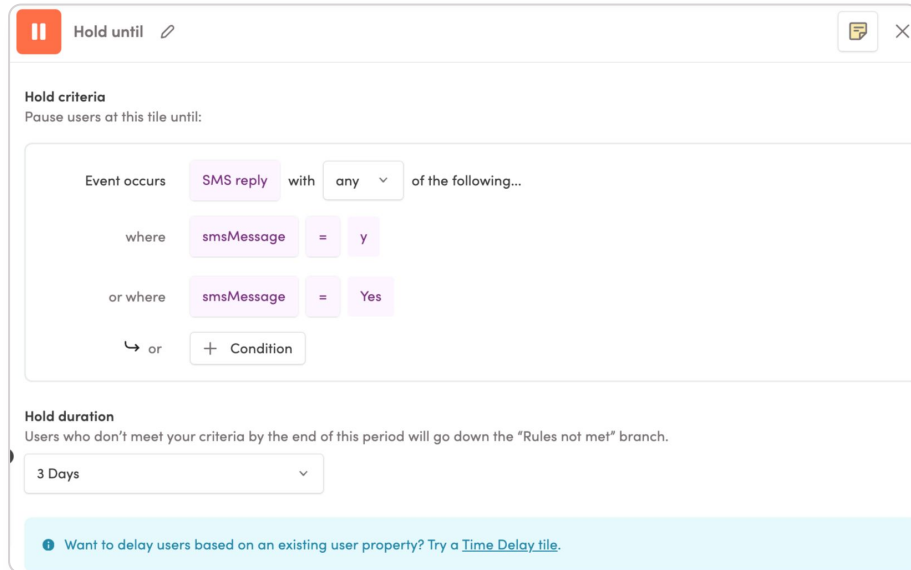
TIME DELAY TILE + SMS OPT IN REQUEST

- Period of time:
  - 1 minute to prevent race condition

- SMS message to confirm opt in

HOLD UNTIL TILE

- Period of time:
  - 3 days

- Amount of time can be modified to fit your strategy. Hold criteria can be adjusted based on double opt in criteria.

REMOVE FROM SUPPRESSION OR UPDATE PREFERENCES

SMS Opt-In Enhancements

Double opt-in. Double opt-in to confirm higher level of interest and engagement among consumers, cleaner subscriber list, and complete transparency.

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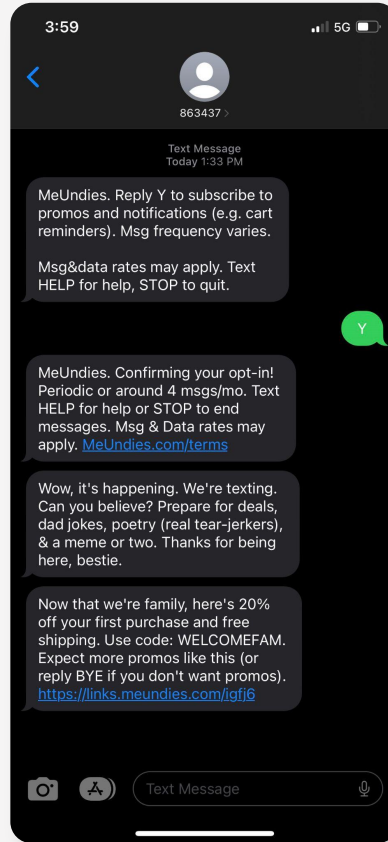
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Human touch. Consider (along with mentioning your brand name) also introducing a human concierge to help with design support, styling tips, and more.

Enhanced Opt-In Example (MeUndies)

Text Message
Today 1:33 PM

MeUndies. Reply Y to subscribe to promos and notifications (e.g. cart reminders). Msg frequency varies.

Msg&data rates may apply. Text HELP for help, STOP to quit.

Y

MeUndies. Confirming your opt-in! Periodic or around 4 msgs/mo. Text HELP for help or STOP to end messages. Msg & Data rates may apply. MeUndies.com/terms

Wow, it's happening. We're texting. Can you believe? Prepare for deals, dad jokes, poetry (real tear-jerkers), & a meme or two. Thanks for being here, bestie.

Now that we're family, here's 20% off your first purchase and free shipping. Use code: WELCOMEFAM. Expect more promos like this (or reply BYE if you don't want promos). https://links.meundies.com/igfj6

Double opt-in

Outline of opt-in content and human touch ('bestie'). Sense of humor.

**Discount code and shop now CTA**

SMS Verified Contact Cards

Include a Verified Contact Card after SMS opt-in that users can add to their contacts! All subsequent messages will be from a known contact.
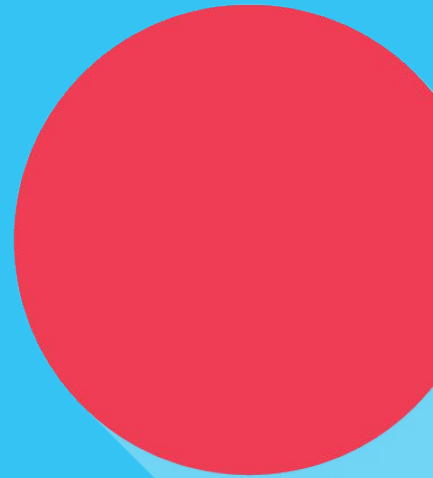
Feature Details:

- Include your brand's email, website, images, and address - all dynamically

- Send support or personalized sales contacts to end users

- Once the verified contact card is saved, links will preview in the text thread
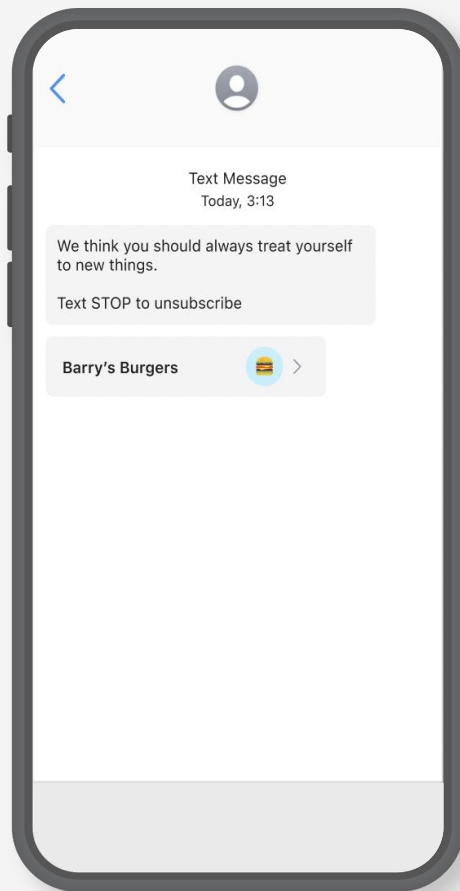
Let's Build
Text-to-Join

Text-to-Join (Single Opt-in)

- Customer sends a message to the registered number with a predefined word like company name(example: **activate**), or a Code (example:**activ24**) etc.

- Create an Iterable Journey, with an Inbound SMS trigger expecting the word **activate**

- Add Customer to designated Iterable SMS Channel using _Subscription_ tile available in workflow canvas

- Send the Customer a message confirming the successful signup message and other necessary information related to SMS compliance

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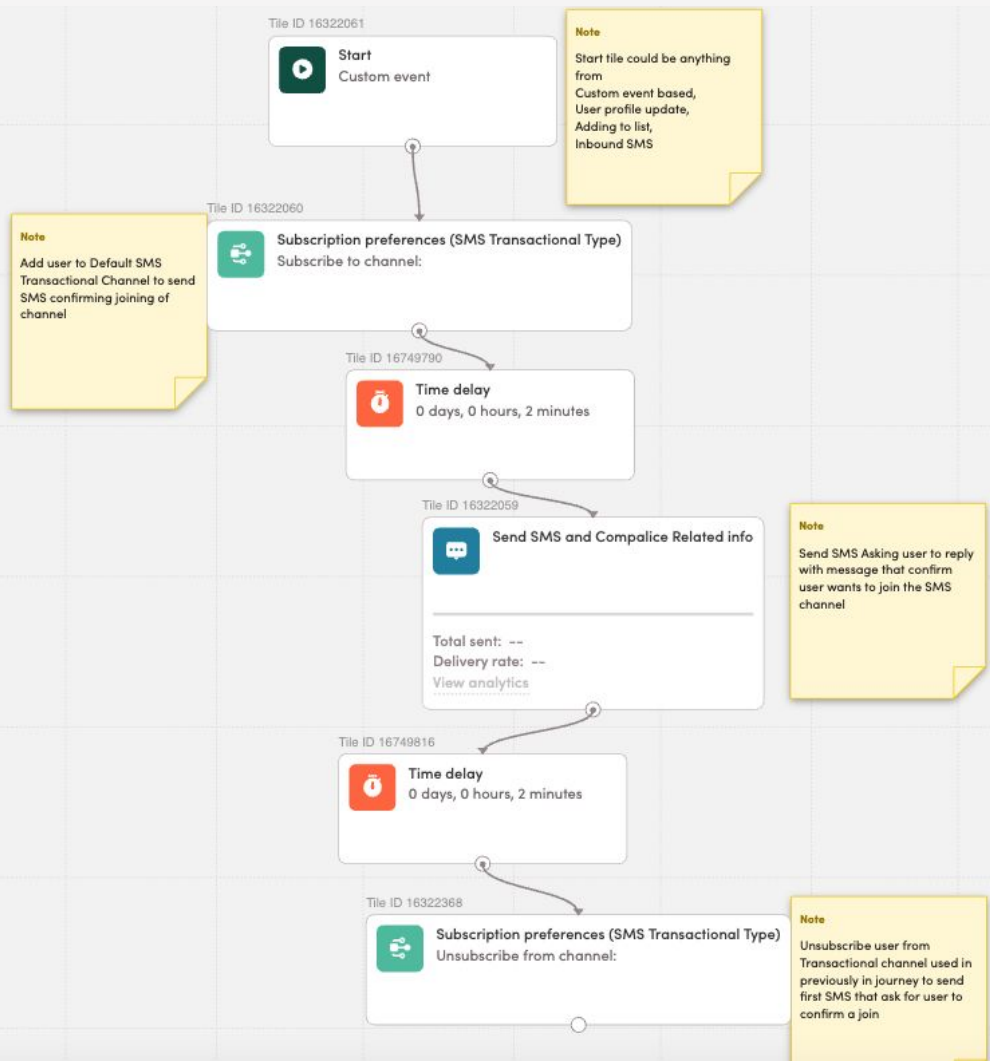
Text-to-Join (Double Opt-in 2nd Journey)

- Journey trigger would be SMS inbound message listening on particular keyword that user suppose to reply with (from step 1a) to include them in SMS channel

- Add Customer to designated Iterable SMS Channel using _Subscription_ tile available in workflow canvas

- Send Customer a message confirming the successful signup message other necessary information related to sms compliance
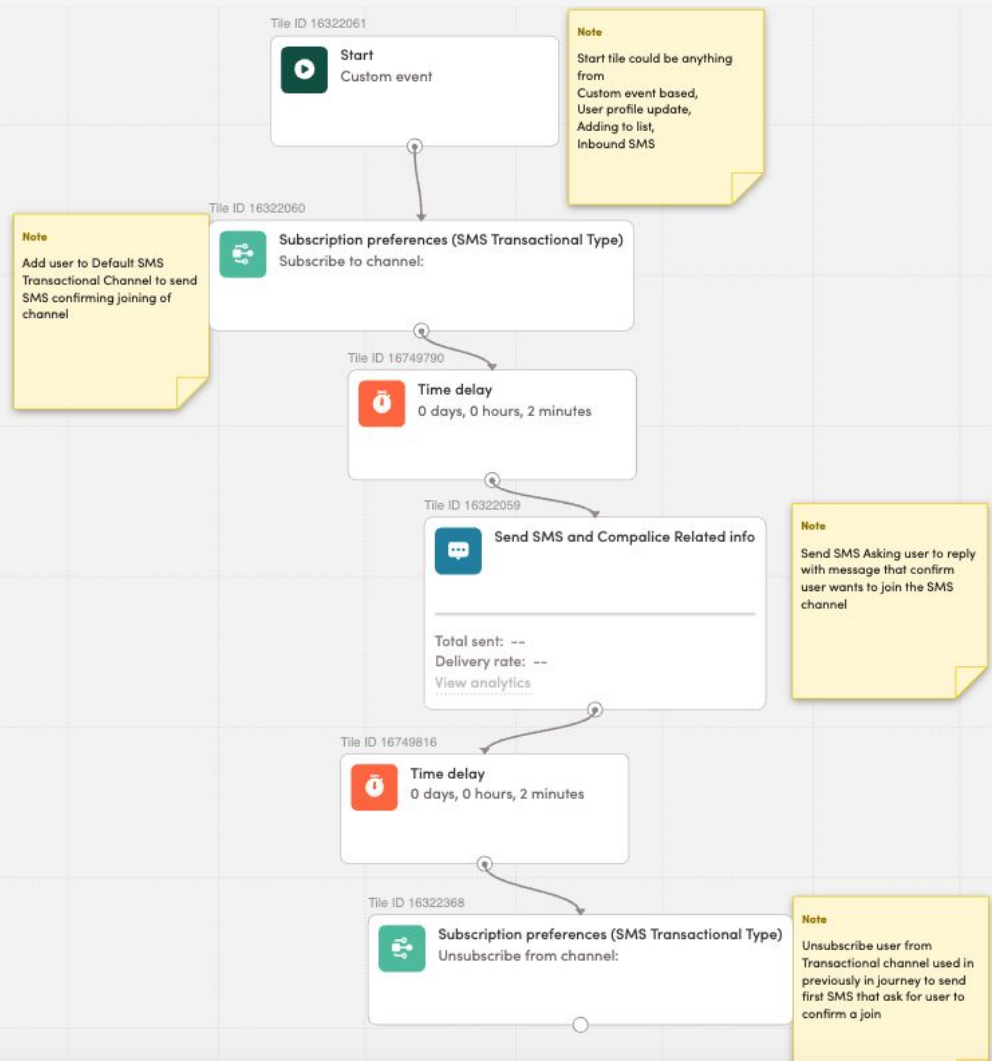
Smart Opt-in

SMS Smart Opt-in for Email

Allow your users to seamlessly and compliantly join your Iterable SMS marketing initiatives with 2 clicks via email.

Benefits:

- Email templates will now recommend compliant language for your user opt-ins

- Create the **SMS Smart Opt-in** which will de-anonymize your SMS users who are writing in

- Add the **SMS Smart Opt-in** link to your opt-in buttons and have users send in their written consent to receive SMS marketing campaigns

- This reduces the need for double opt-in and allows for **proof of compliance**

- Less effort in adding a phone number

Iterable SMS: Smart Opt-In

Allow users to seamlessly and compliantly join Iterable SMS marketing initiatives with 2 clicks via email.

Benefits

- Email templates will recommend pre-written compliant language or marketers can create their own disclaimer

- Have users easily send in their written consent to receive SMS marketing campaigns

- Spend less effort obtaining phone numbers and proof of opt-in compliance

- De-anonymize SMS users once they provide their phone number
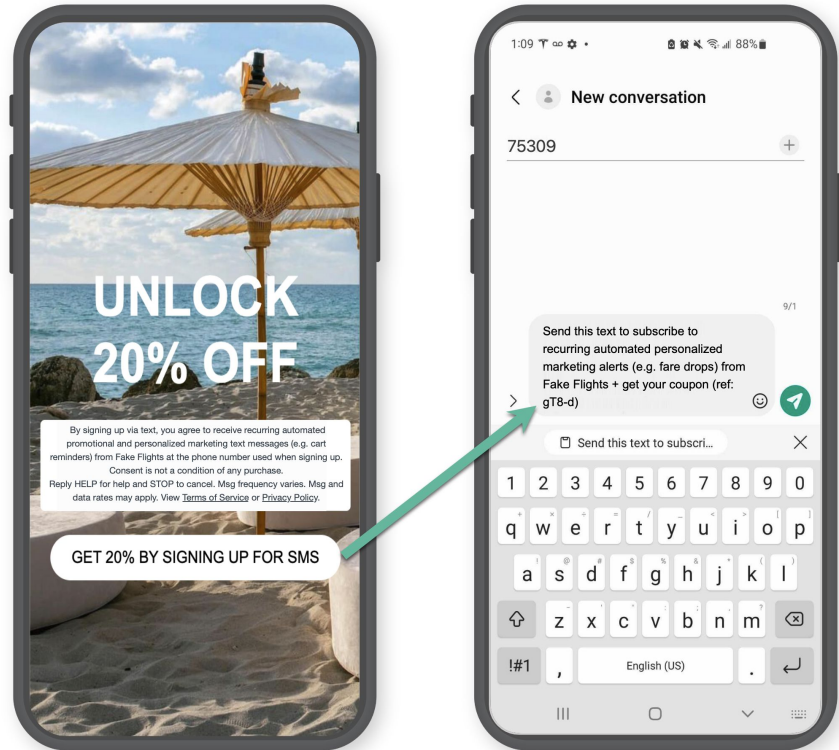
Iterable SMS: Smart Opt-In

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Things to Note

- Only existing users in Iterable can subscribe to your SMS channel using SMS Smart Opt-In.

- Not intended for text-to-join use cases that sign up new users.

- You can include a redirect link so if a user isn't on a mobile device when they go to opt-in, they are still sent to a web form that collects SMS opt-ins

End User Experience

1) A button is presented to the known user powered by *Iterable's Smart Opt In*.

2) Button is clicked and a pre-populated SMS message and phone number are setup in the devices SMS messaging.   The prebuilt inbound SMS message has the following information:

- A message proving compliance for a given marketing channel.
- Hashed version of their email or UUID so we can attribute the phone number to a given profile.
- Other potential information including:
  - Promotions
  - Discounts
  - Tracking parameters

Step3
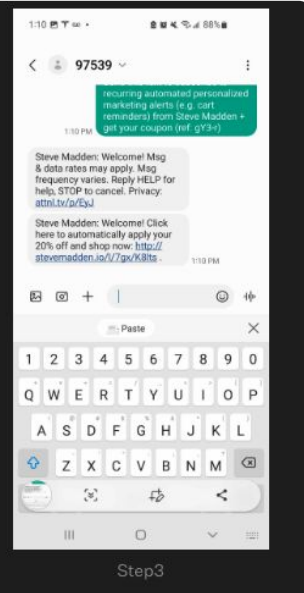
Choose One Opt-in Method to Uplevel

- Double Opt-in

- Text-to-Join

- Smart Opt-in

Discuss a plan to implement, keep it simple!

15 minutes

Slido for questions

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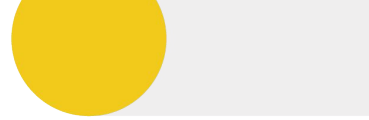
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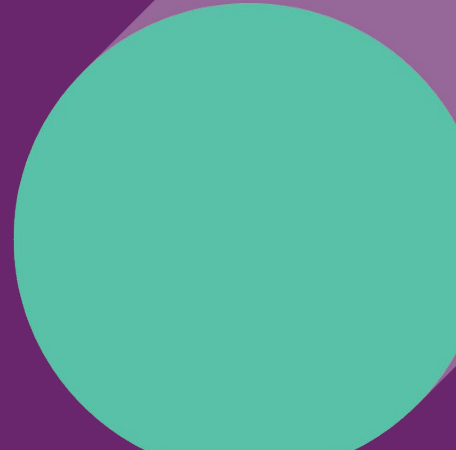
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SMS Maturity Model

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Cross-Channel Differentiated Strategy

Leverage each channels strengths appropriately

SMS

Extremely personal

Disruptive, timely, creates urgency

Limited to one CTA

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Usually more than 1 CTA

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MOBILE PUSH

Disruptive channel

Drives traffic to mobile app

Short and to the point

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Designing Effective Campaigns and Journeys

- Post-Purchase Follows Ups

- Ratings and Reviews

Post-Purchase Upsell

Goal and Outcome

1. **Increase multiple item purchases**
2. Drive users to complete their collection

Upsell Opportunities

1. Provide **product-specific recommendations** based on purchased items
2. **Use metadata** such as collection, category, and color to match products
3. **Leverage Catalog** to the quickly develop different kinds of product recommendations

Consider utilizing experiments, especially with testing the initial post-purchase campaign(e.g. send 10% of new users no discount, 90% discount, determine if discount drives more purchases, influences how quickly someone purchases, etc.)

Product Recommendations

Provide relevant product recommendations as upsell opportunities utilizing the information collected on each purchase

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AI-requested recommendations powered through data feeds OR leveraging Iterable's Predictive Goals to build cohorts for specific buyer profiles

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SMS Example: Product Recommendations

Post Purchase - items related to recent purchase

Brightland: We hope you have been enjoying your olive oil.

If you're looking for something new, we recommend The Pair, our vinegar set containing citrus champagne vinegar and blackberry balsamic. We love adding them to stews, as many salads as possible - even desserts and cocktails!

🔷 Shop here: https://brightland.pscr.pt/

Questions? Just reply to this message. Our customer service hours are weekdays 9am - 5pm PT.

What does this message do well?

Brightland: We hope you have been enjoying your olive oil.

If you're looking for something new, we recommend The Pair, our vinegar set containing citrus champagne vinegar and blackberry balsamic. We love adding them to stews, as many salads as possible - even desserts and cocktails!

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- Include a shop now CTA

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What could be improved?

- Where's the urgency?

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What does this message do well?

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- Provide a related recommendation
- Include a shop now CTA

What could be improved?

- Where's the urgency?
- Image and long form copy
- Multiple CTAs

Ratings & Reviews

Goal and Outcome

1. **Increase engagement** with Rating and Reviews
2. Collect content by making it easier for users to **engage on mobile**

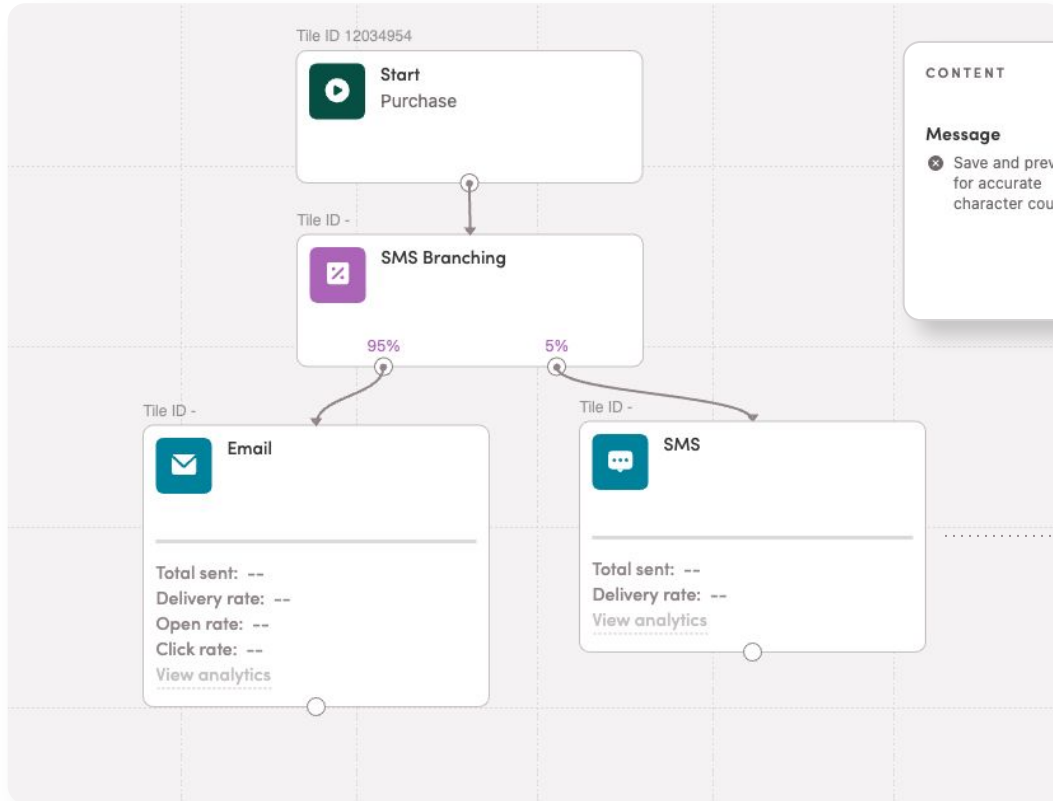## Rating and Reviews Recommendations

1. Branch the ratings and reviews campaign **to include a test group that trials SMS follow ups**
2. **Ask for users to provide feedback** on their purchases with a simple number response
3. **Target users that respond positively** with a link to submit content for a reward

Additional Nurture journey strategy and recommendations included in the Appendix

Ratings & Reviews – Journey #1

Tile ID 12034954

Start
Purchase

Tile ID -

SMS Branching

95%   5%

Tile ID -

Email

Total sent: --
Delivery rate: --
Open rate: --
Click rate: --
View analytics

Tile ID -

SMS

Total sent: --
Delivery rate: --
View analytics

CONTENT

Message

⊗ Save and preview for accurate character count.

Thank you so much for your recent purchase! We want to hear all about your experience, what star rating would you give {{purchase.itemName}}? Please respond with a number 1 - 5

Msg&data rates may apply. Text 'STOP' to quit.

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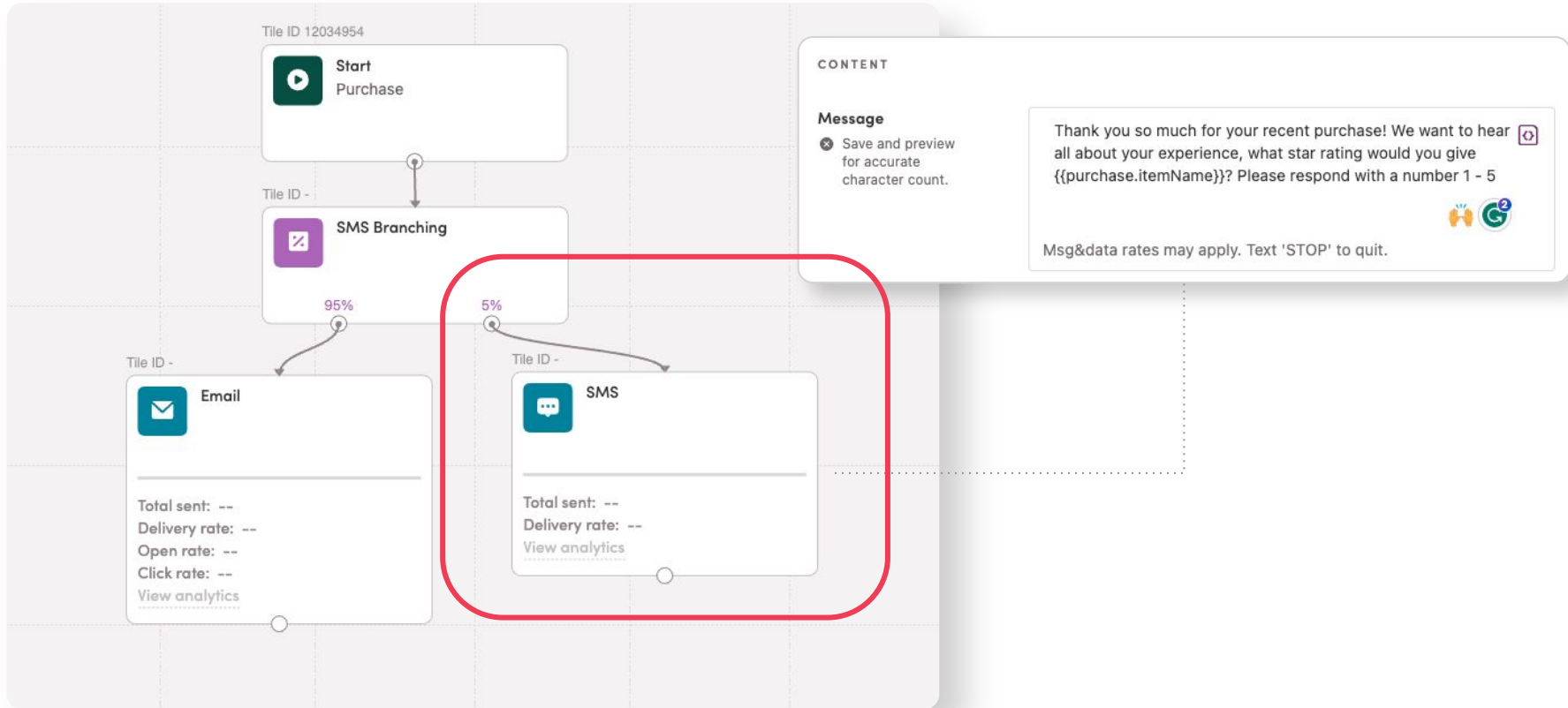Delivery rate: --
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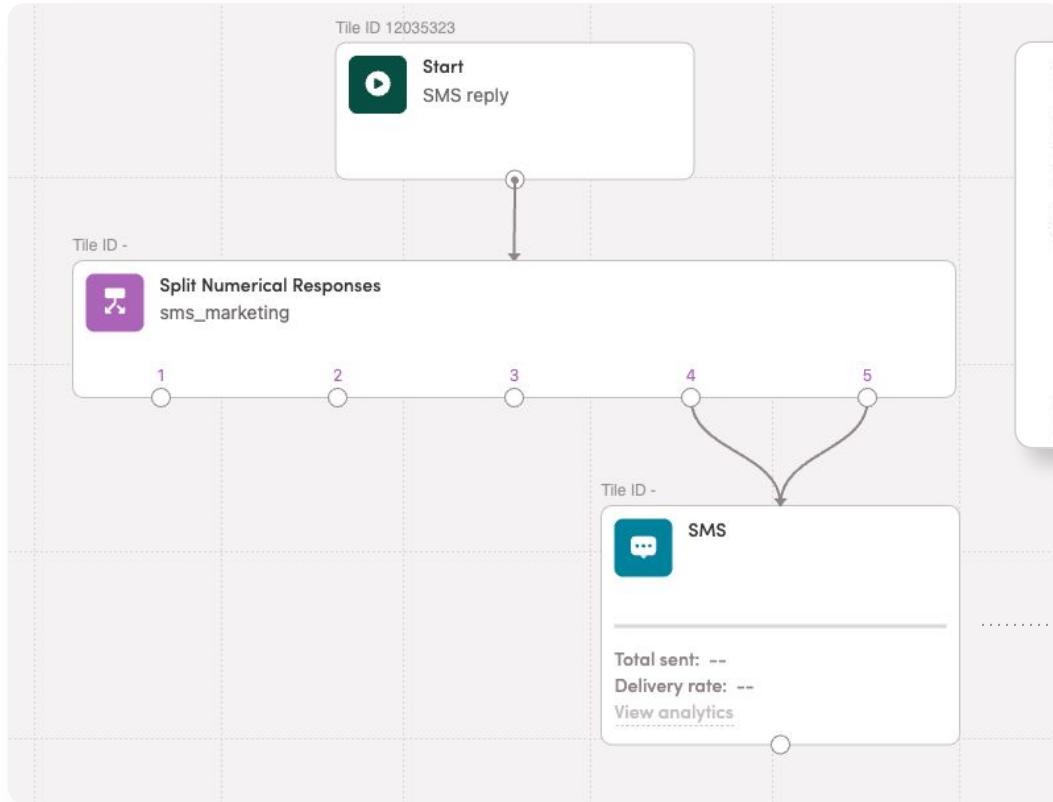
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Ratings & Reviews – Journey #2

Tile ID 12035323

Start
SMS reply

Tile ID -

Split Numerical Responses
sms_marketing

1 2 3 4 5

Tile ID -
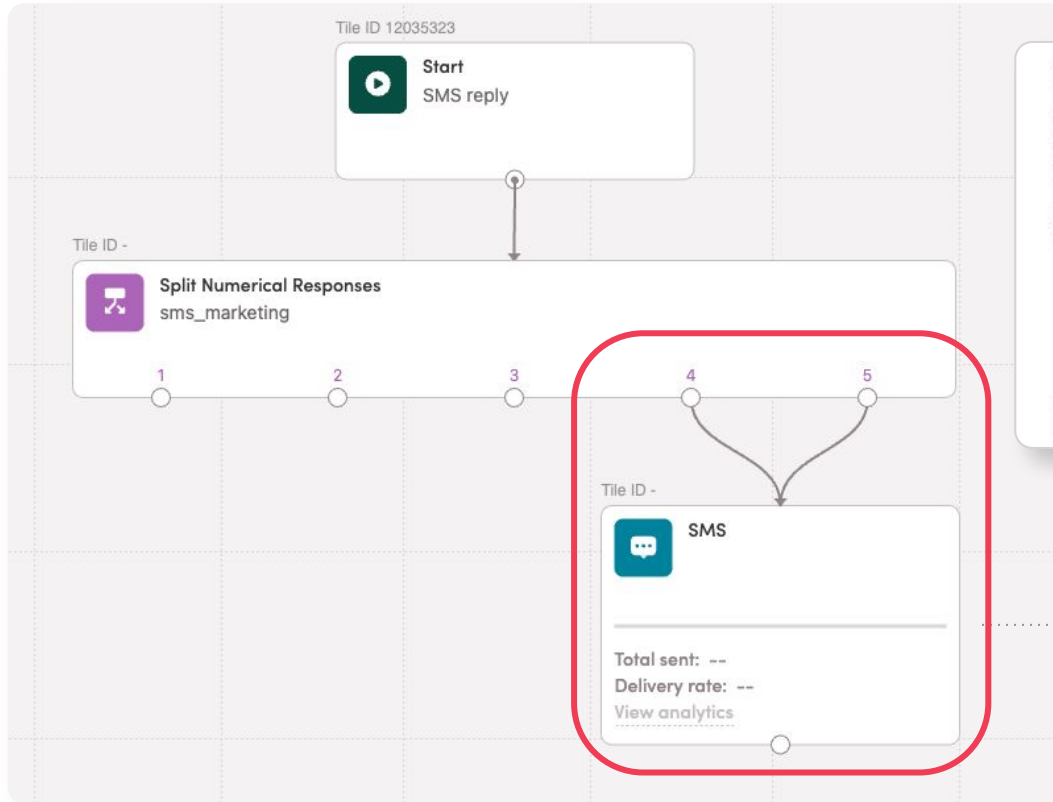
SMS

Total sent: --
Delivery rate: --
View analytics

Hi {{firstName}}, thank you for rating your last purchase! Would you like to get $25 off your next purchase? Send us a picture of your new {{purchase.items}} at the link below:

links.itbl.co/1a48fz

Msg&data rates may apply. Text 'STOP' to quit.

Ratings & Reviews – Journey #2

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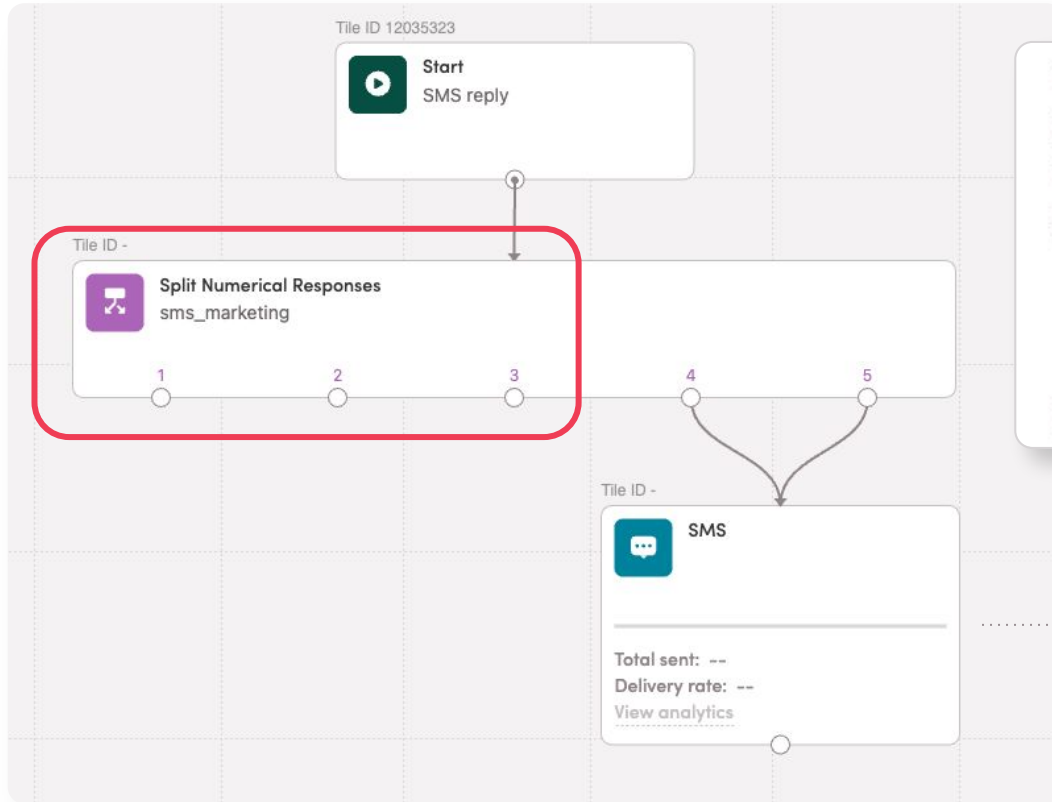
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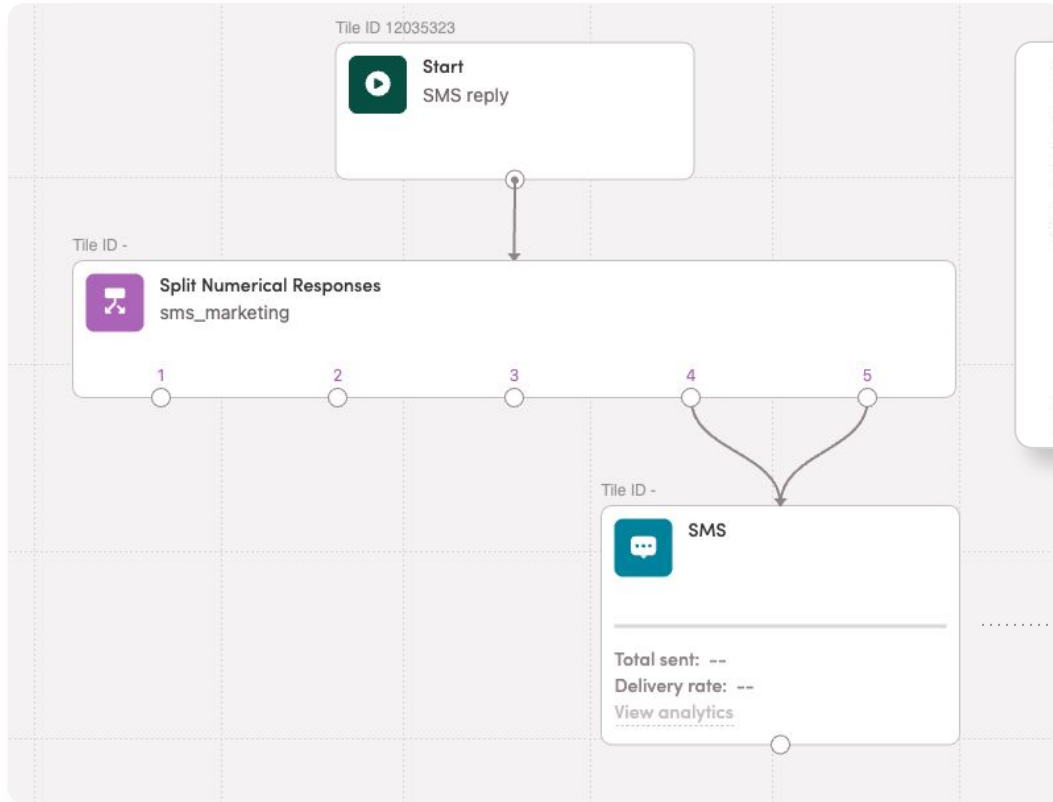**SMS**

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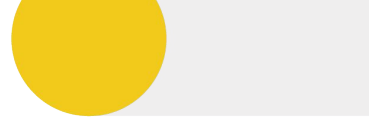**Pick an SMS campaign or tactic we discussed here**

- Does your team have something like this in play?
- Can you identify 1 element you could incorporate?
- What strategies would optimize conversions?

Take turns sharing your ideas with the table

10 minutes

Slido for questions

slido.com
2688692

Wrapping Up

Today's Learning Objectives

Understanding SMS Program Maturity

Where are you on your journey with SMS as a channel and do you know what to prioritize next?

Learn to Build an SMS Subscriber List

How can you leverage the tools and data on hand to drive opt-ins?

Design Effective Campaigns & Journeys

Understand the elements that drive action and how to incorporate SMS into your customer communications plan.

SMS Maturity Model

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Take the Next Step

Become SMS Marketing Certified!

1 Complete the SMS Learning Path to help you prepare (highly recommended!).

2 Test your knowledge of SMS strategy, compliance, and Iterable processes and features.

3 Pass the exam and let everyone know with a certificate you may download or share on Linkedin

START NOW

https://academy.iterable.com/sms-certification-exam

Visit the Iterable Booth at Activate!

- Learn the onboarding process and best practices to migrate to Iterable

- Adopt more channels, better activate their data, and gain more value from their Iterable investment.

- Hear success stories from peers in your space.

Thank you!

RESOURCES

- [Journeys Overview](#)

- [Events and Event Properties](#)

- [Track Event API Endpoint](#)

- [Setting up SMS](#)

- [Creating SMS Templates](#)

- [Iterable Academy SMS Learning Path](#)

- [Iterable Academy SMS Certification Exam](#)