

How To Evaluate SMS Marketing Solutions For Your B2C Enterprise

What marketers need to know to choose
the right solution to drive sales and ROI





This ebook is brought to you by CodeBroker, creators of the industry-leading CodeBroker text message marketing platform with SmartJoin.™ CodeBroker is used by top retailers and brands to leverage SMS to rapidly build marketing lists at scale for text, email and loyalty programs.

To learn more, please visit us at: www.codebroker.com

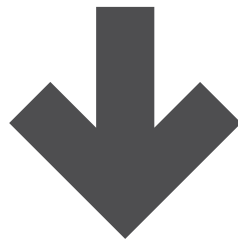


Evaluating SMS solutions isn't easy

There are so many solutions on the market and they can be hard to differentiate. On the surface, they might appear similar. But when you look behind the curtain you will see – that's not the case.

This guide will help you understand the most important characteristics to seek in an SMS marketing solution, so you can identify the best provider for your organization. We will touch on the key criteria for selecting an SMS vendor, to help you make better decisions on building and reaching an engaged audience.

So let's get started



10 Characteristics

To Seek in an
SMS Marketing Provider

SMS is a powerful marketing vehicle – one that has become an essential way to engage with today's consumers. The dilemma for marketers is that text message marketing solutions are often technical and complex to use, with vendor support that often is lacking.

SMS marketing solutions have dozens of features, many of which are down-and-dirty technical features that are quite similar across solutions. Here, we will stay away from the tech talk and focus on ten must-have characteristics that marketers truly need for successful, ongoing text message marketing campaigns.



1. Easy for marketers to use

You want to choose a self-serve solution that has the capabilities you need, however it's really important that the system is also easy to use – so you can get the most from these capabilities and keep your campaigns moving without delays. Ease-of-use comes down to two factors: 1) an intuitive interface, and 2) strong vendor support should you ever need assistance.

As you evaluate solutions, take the opportunity to get hands-on with the system, explore the interface, and set up a sample campaign. Vendor demos are always nice but getting hands-on with the system will give you the best insights into a system's usability. You should also meet your account manager, ask what level of support you can expect, and what services they provide.



2. Account Management / Support

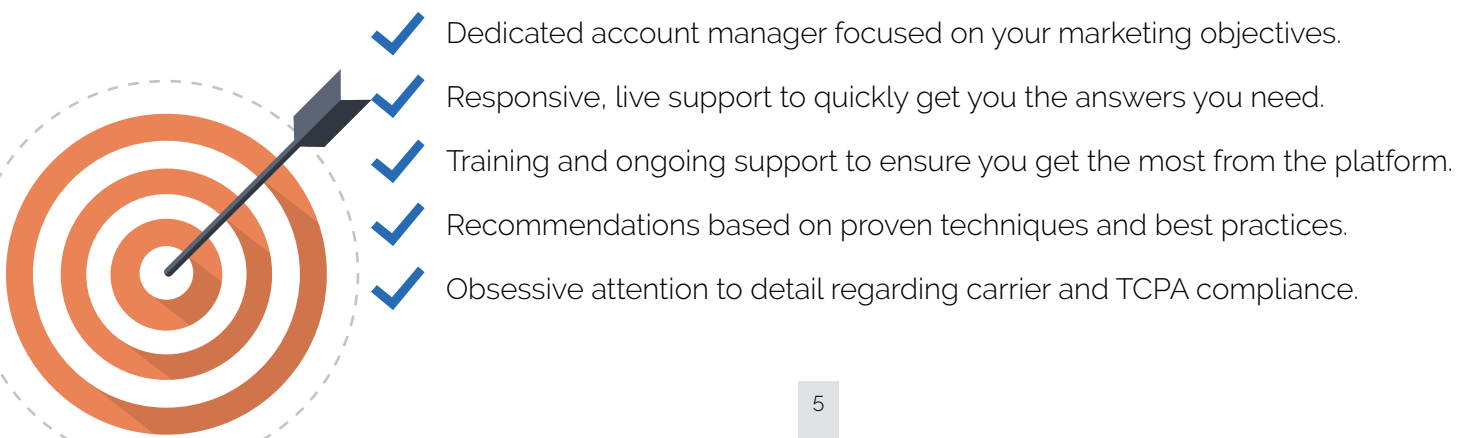
When is the last time you ran a marketing campaign that wasn't on a tight timeline?

The answer, most likely, is never. You can't afford delays when trying to get a campaign out the door. And this is why exceptional vendor support should be just a phone call away if and when you need it.

A strong SMS marketing vendor will provide a service team that, not only helps you to avoid problems, but also provides you with ongoing recommendations and feedback to ensure that you are optimizing campaign potential and the customer's experience with your brand.

You should look for a provider that offers both ongoing, proactive account management, as well as on-demand support should you have questions. If you're a larger organization, you should expect a dedicated account manager, rather than find yourself in a support queue of potentially dozens of clients.

Customer Service to Ensure Your Success!



3. A vendor that can grow your list rapidly

Many SMS providers will tell you that they can help you to quickly grow your list but, when the time comes, they often fall short. There are a few factors to consider to help you identify a vendor with the ability to grow lists quickly.

One of the most important factors in growing a list quickly is to give customers a quick and easy way to sign up – and this comes down to the quality of the sign-up process.

If you want to collect demographic information as part of the sign up process, you'll need an intelligent form that does not require further confirmation after the customer accepts the terms.

To learn if your SMS provider can do this, you should ask if they can automatically populate the mobile number on the sign up page after a consumer has initiated the process via SMS. This is important because it saves the customer time, ensures accuracy, is mobile carrier compliant, and ensures high completion rates.

Ask the vendor to see examples of the sign up process and even try it for yourself in order to see what your customers will experience. If you



3. A vendor that can grow your list rapidly

...Continued

are looking to capture demographic info on sign up, try to identify a solution that auto-populates the phone number, requires minimal steps for the consumer, and offers a customizable form to capture the most important demographic information.

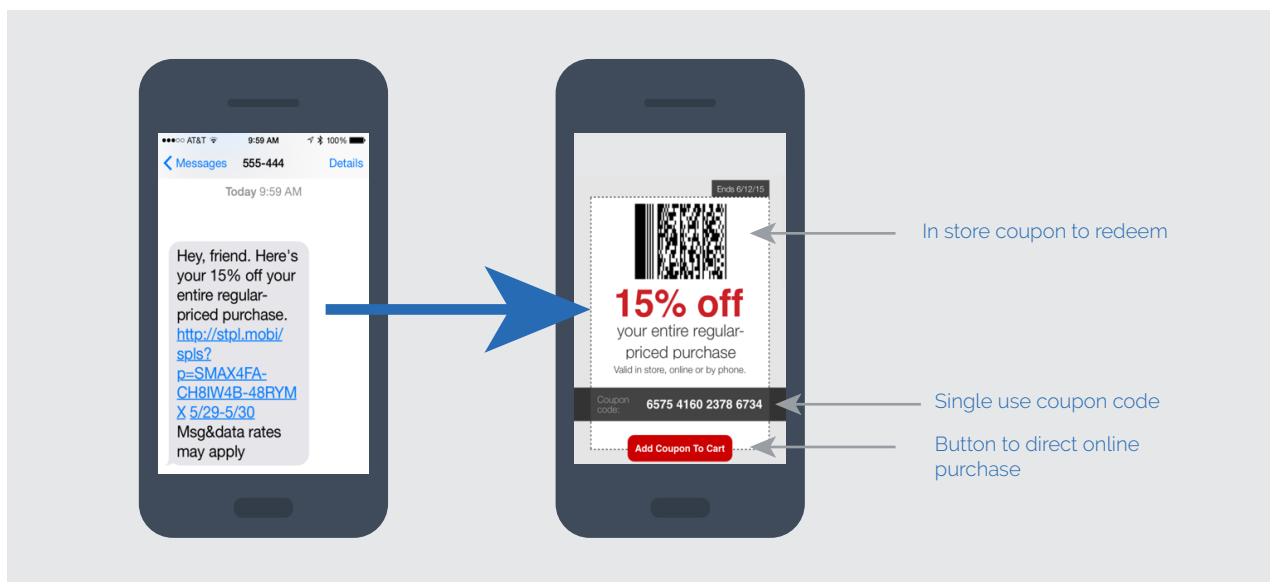
Flexibility – The sign-up process should also be flexible so that it supports a broad number of use cases, such as:

- ✓ Join an SMS list
- ✓ Join an email list
- ✓ Issue a rewards number
- ✓ Deliver a digital loyalty card
- ✓ Deliver a welcome mobile coupon (and ensure that customers can only receive one)



4. Tight integration with a digital coupon solution

Incremental revenue can be attributed directly to SMS campaigns that employ digital coupons that the consumer uses at checkout directly from her mobile device. Digital coupons tied to an SMS campaign can be a highly cost-effective way to improve customer engagement, increase store traffic, and enhance basket size. Other benefits include an improved customer experience and the ability to track the complete path to purchase.



Just about every SMS provider will tell you that they deliver mobile coupons, but, often, these are nothing more than a generic promo code within the text message that can't be tracked. Any SMS vendor can deliver a promo code in a text message.

4. Tight integration with a digital coupon solution.

...Continued

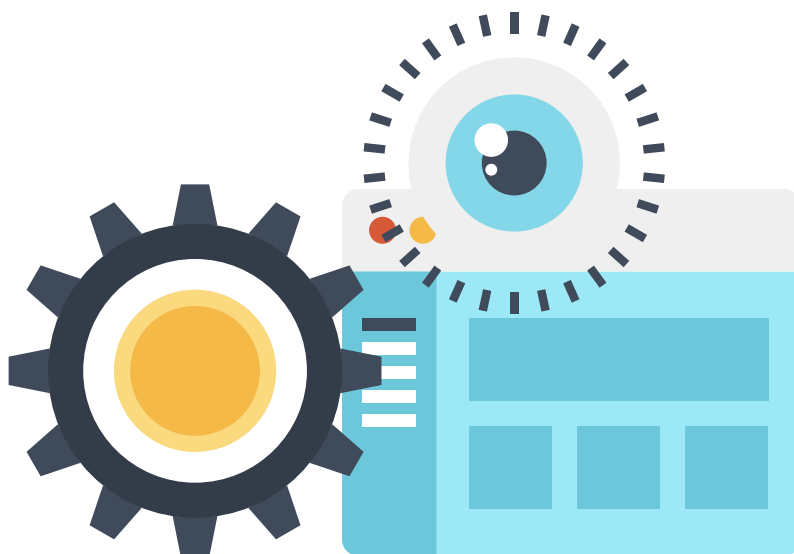
The challenge is that the vast majority of these “offers” can be used by customers multiple times. Though generic mobile coupons that can be used many times can be useful in certain situations, it's also important to be able to run campaigns where each coupon can be used only once and can be tracked where it's used, and even by whom.

You will want to look for a solution that employs a security model that guarantees secure, single-use coupons that can be redeemed only once, regardless of the number of channels a consumer views her digital coupon.

5. Works easily with your marketing infrastructure

You will want an SMS solution that has robust APIs to enable the system to easily share data with your other systems – CRM, loyalty, analytics, and websites – with minimal IT support. It is also important to choose a vendor with solid experience maximizing the value of these integrations.

It's also valuable that the solution has a campaign manager that you can use in conjunction with your existing systems, to enable you to send personalized text messages and offers, perform granular segmentation of offers, and track performance to drive ongoing campaign decisions.

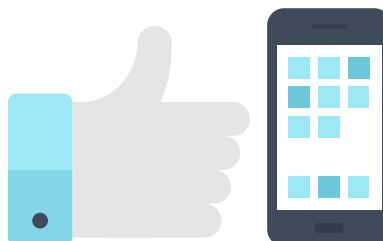


6. A true compliance partner

There are a range of laws and mobile carrier requirements that come with SMS marketing, and there is great value in a partner that can help you successfully navigate these regulations. You want a partner who will help protect you and stay up-to-date on the ever-changing mobile marketing compliance rules.

You can circumvent campaign problems and audits by working choosing a provider that:

- ✓ Has TCPA expertise in house
- ✓ Proactively helps you ensure TCPA and CTIA compliance
- ✓ Takes extra precautions when dealing with recycled numbers
- ✓ Can respond in a timely manner in the case of any consumer TCPA complaints
- ✓ Provides strong opt-in backup data in case of a consumer TCPA complaint








7. Strong data security standards

Your company's customer data is one of its most valuable assets – and that's why you want an SMS provider that takes your data security seriously. You should expect your provider to support PCI level 1 security (same level required for processing credit cards), and to have a comprehensive and documented information security and privacy program. It is also recommended that you have your security team conduct a security audit of your chosen vendor.



8. A solution that grows with your changing needs

Today's consumers use a range of mobile channels, and their preferences vary from one consumer to the next. This is why you will want to select an SMS marketing partner that can grow with you as your needs expand, to provide additional capabilities, such as:

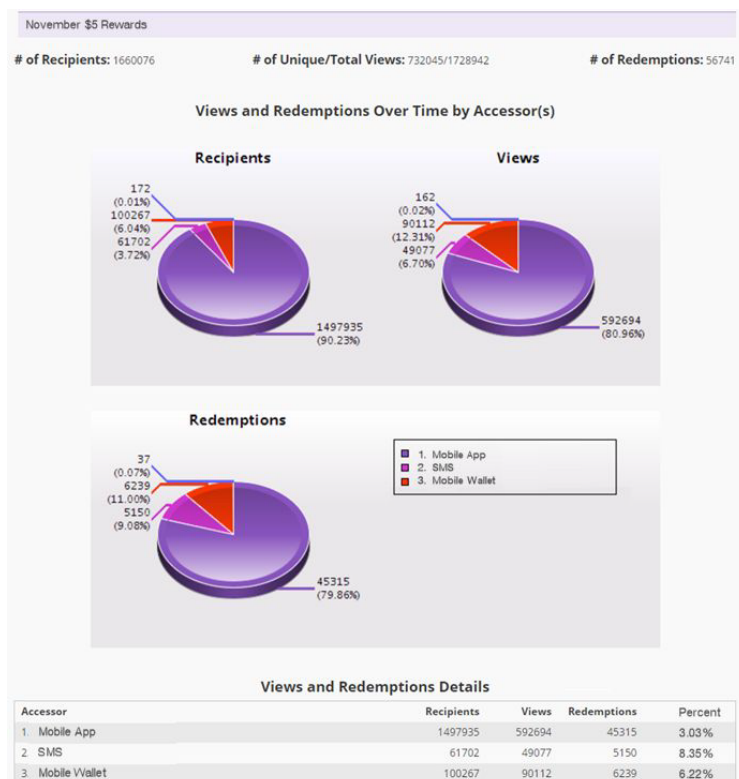
-  Robust text message marketing capabilities beyond the basics, to support use cases such as sweepstakes, voting, and other more sophisticated capabilities.
-  The ability to send messages to other mobile channels, such as mobile wallet, Facebook, and push notifications to mobile apps.
-  A single consumer profile across all mobile channels, and which ties all of a consumer's mobile channel IDs back to that consumer, to enable you to deliver synchronized, consistent messages across mobile channels.
-  Loyalty platform interfaces, to give members access to your rewards program via SMS.
-  Transactional alert capabilities to improve customer service.

9. Robust tracking and reporting

Strong tracking and reporting are key to measuring the success of your SMS campaigns, so be sure to choose a solution that offers the capabilities you need to measure campaign performance. Ask vendors to show you their reporting dashboard and the reports the solution can provide. Some systems do batch reporting. Some do real time. You should ask what's available in real time and what's delayed. You really want a system that provides real-time reporting to more effectively track campaign performance.

Some of the reports you will want from a solution include:








- ✓ Summary "at-a-glance" dashboard to track list growth and consumer engagement
- ✓ Redemption performance metrics: by message, keyword, time, channel, segment
- ✓ "Join metrics" – to see where customers drop out of the join process
- ✓ Responses/Click-Throughs
- ✓ Opt-in / Opt-outs /list growth
- ✓ Subscriber reporting to track a customer's communications with your brand
- ✓ Ability to export reports



10. Track record of proven results

The SMS vendor you choose should have a strong track record of delivering results for other clients. You will want to ask potential vendors to provide real metrics that they have achieved for similar companies, and also provide references to validate a track record of success.

Metrics to Ask About





-  New adds/week or month
-  Monthly opt-out rate
-  List growth
-  How quickly a list can be grown
-  Sign-up completion rate
-  Redemption rates for mobile offers
-  Revenue/contribution from similar programs

Where to go from here

Thank you for taking the time to read our paper. If you are evaluating Text Message Marketing Solutions, we invite you to take a look at CodeBroker. Our [text message marketing solution](#) offers all the criteria you just read about, and a lot more. Our solution is used by the nation's most recognizable brands across the U.S. and Canada with exceptional results.



Delivers SMSuccess

-  Easy-to-use and quick to learn.
-  Dedicated support from an expert project manager.
-  Advanced capabilities such as [SmartJoin](#) list sign-up.
-  Track record of impressive sales results and ROI for top retailers and brands.

We invite you to learn more!


Please contact us at

info@codebroker.com

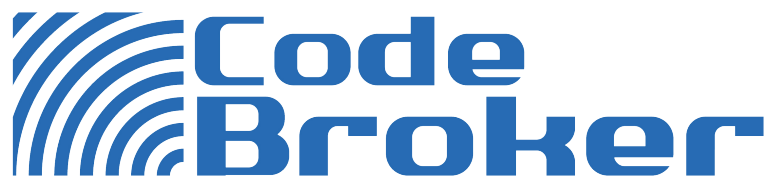
ACCOUNT MANAGEMENT/SUPPORT		VENDOR 2	VENDOR 3
Dedicated account manager (for larger clients).	✓		
Responsive, live support to get you the answers you need right away.	✓		
Training and ongoing assistance to ensure you get the most from the SMS platform.	✓		
Recommendations based on proven techniques and best practices.	✓		
Help to ensure carrier and TCPA compliance.	✓		
EASE-OF-USE			
Intuitive interface	✓		
Ease of campaign set-up	✓		
Ease of campaign execution	✓		
SIGN-UP FORM			
Ease of use	✓		
Information capture	✓		
Customizable form content	✓		
Auto populate form with mobile phone #	✓		
COUPON CAPABILITIES			
Includes digital coupon capabilities	✓		
Offers single-use and multi-use coupons	✓		
Deliver coupons to mobile wallet or mobile app	✓		
INTEGRATION W/ MKTG. INFRASTRUCTURE			
APIs for integrations with other 3rd-party systems (CRM, loyalty, analytics, web sites)	✓		
COMPLIANCE ASSISTANCE			
In-house TCPA expertise	✓		
TCPA and CTIA compliance support	✓		
Rapid response to consumer TCPA complaints	✓		
Conducts regular security audits and has a written company information security and privacy program.	✓		
Can respond to corporate security audits	✓		
Data is encrypted at rest	✓		
Servers hosted in a PCI level 1 data center	✓		



Text Message Marketing Solution Vendor Checklist

PLATFORM		VENDOR 2	VENDOR 3
Permission-based Accounts	✓		
A/B Testing	✓		
Subscription	✓		
Tag and collect metadata	✓		
Segment subscribers (Metadata)	✓		
Segment subscribers (CRM system)	✓		
REPORTING			
Responses/Click-Throughs	✓		
User Engagement	✓		
Opt-in / Opt-outs	✓		
Ability to export reports	✓		
PRICING			
Platform pricing/mth			
Short Code Provisioning / Set-up			
Ongoing short code fees			
Message Pricing			
Additional Service Pricing (if any)			

NOTES:



464 Common Street, Suite 204
Belmont, MA 02478

www.codebroker.com

(800) 928-7315

info@codebroker.com