

---

E-BOOK

# Business Messaging Roadmap



Improving customer engagement requires  
integrating messaging into ongoing conversations.  
It's easy, and it's what your customers expect.





# Accelerating customer engagement

Messaging has emerged as a convenient and necessary two-way customer communication channel. In a [recent Nielsen study](#), 53% of consumers surveyed are more likely to shop with a business they can message directly, and 56% would rather message a business than phone customer service.

Sometimes referred to as SMS (Short Message Service), text messaging helps companies connect with customers in a more intimate and preferred way, giving them the ability to offer support, make product suggestions, schedule an appointment, make a sale, and get instant feedback. Today, messaging has evolved into more than just texting: it could be sending a compelling image, having an interactive web chat, or communicating via Facebook. In whichever way it's used, messaging allows companies to engage with customers on their terms – anytime, anywhere.

Modern companies have learned that by deploying business messaging solutions at scale, they can quickly and easily equip their employees with the digital channels needed to build strong, lasting customer relationships. At the heart of everything, it's important to understand that every customer wants to feel understood. That starts by creating a 1:1 relationship during every conversation and with each customer touchpoint, regardless of who is interacting with them.

## What's inside

---

- [Why messaging is integral to your customer engagement strategy](#)
- [How messaging can increase engagement](#)
- [How business messaging enables better conversations](#)
- [Business messaging customer spotlight](#)
- [What to look for in a cloud-based messaging provider](#)
- [How Twilio can help you improve important customer connections](#)
- [Back of book bonus: business messaging terms](#)



# Why messaging is integral to your customer engagement strategy

Today's consumers are redefining the business-to-consumer communication dynamic. The rapid rise of social media and smartphone usage is opening up entirely new channels for companies to reach targeted and receptive audiences. That's why business messaging is quickly emerging as one of the best and most reliable ways to successfully communicate with your customers.

The use of B2C messaging is taking firm hold in organizations worldwide and with good reason: when done correctly, it works. In fact, because texting is available on nearly all mobile devices, brands using SMS typically reach 95% of users.

---

## CONSIDER THESE SUPPORTING FACTS

- *65% of marketers report that SMS is a very effective marketing tool.*
- *SMS marketing yields impressive results with open rates at just over 82%.*
- *Text messages that include a URL achieve an average click-through rate of 36%.*
- *SMS coupons are redeemed 8% more than emailed coupons.*
- *84% of businesses are using mobile marketing methods report increases in new customers.*



# There are four key considerations that apply to most every customer engagement:



## 1. Connect with customers on their terms

*9 out of 10 consumers would like to use messaging to communicate with businesses.*

With approximately five billion users globally, mobile phones represent one of the most ubiquitous channels of communications. The immediacy, convenience, and personal nature of business messaging gives organizations the perfect opportunity to connect with their customers around the world on the devices they use throughout the day, every day. Plus, messaging is what your customer wants. If you're not engaging your customers on their preferred channels, how can you expect to retain them?



## 2. Enhance communication services to include messaging

*There is typically a 25% drop in loyalty among customers who experience a problem.*

Traditional communication channels are no longer sufficient to meet consumer demand. To thrive in this digital era, you need to be omnichannel ready, empowering your employees to easily connect with customers on whatever device they're using. If you're not communicating with your customers the way they want and responding to them in real-time, you risk losing them.

*Because so many consumers prefer communicating via SMS, businesses around the world need to make messaging a priority to stay connected with their customers.*





### 3. Strategies should impact all channels & customer touchpoints

---

Nearly *three out of every five consumers* are frustrated by being unable to access the information they want in their communication method of choice.

Typically, customers are interacting with your employees at multiple touch points, from pre-sale research to point-of-sale to customer service inquiries. It's critical to provide your staff with the ability to pivot between channels, and more importantly, to understand what's been covered from one conversation to the next. As you develop your communication engagement strategies, be sure to take advantage of new analytics capabilities that will gather interaction data from each customer touch point—and each message—to ensure informed and insightful conversations every time.



### 4. Look to the cloud for easy and cost-effective solutions

---

There's no escaping the fact that *omnichannel customer experiences* require a cloud computing foundation to be successful.

It's inherently easier and faster to launch digital communication solutions via the cloud than to do so with on-premise technologies. Cloud communication APIs can empower your developers to add real-time communications features into applications without having to build backend infrastructure and interfaces. And many include drag-and-drop capabilities to make integration even more straightforward. With the right cloud provider, you can create the exact solution that works for your business to communicate with and engage your customers.



# How messaging can increase engagement

It's hard to believe that it's been over 30 years since the first text message was sent. In that time SMS has evolved from simple connections among family and friends to a vibrant, interactive business communication tool. What's more, companies are no longer limited to 160 characters: business messaging has expanded to include the ability to send videos and photographs through MMS (Multimedia Messaging Service) as well as communicating through chat and Facebook Messenger. The latest communication advancement is deploying RCS (Rich Communications Service) which allows consumers to add appointments to a calendar, map directions to a business, browse a carousel of products, make purchases, track deliveries, and more—all from a mobile device.

The evolution of business messaging is enabling companies to build dynamic and more personalized relationships by engaging customers in the simplest way possible. Here are a few more ideas of how business messaging can work for you:



## Remind customers of engagements

Your customers are busy. Instantly send automated appointment reminders to improve the customer experience and reduce no-shows!



## Resolve conflicts, faster

Don't let bad situations get worse: respond to a web chat or text message in real-time to immediately resolve customer issues or complaints.



## Stimulate sales

Haven't heard from a customer in a while? Take advantage of social apps like Facebook Messenger or SMS to send promotions based on past purchases or browsing activity.



### Make brand connections

Marketers strive to have customers delight in their brand. Make your messages more creative using videos, photo contests, polls, and more to connect with them in a fun way.



### Reward loyalty

Thank your customers. Acknowledge your customer's devotion with a special incentive or offer they can't refuse.



### Ease redemptions

SMS makes it super easy for customers to access your latest discount voucher or redeem a ticket purchased right from their device



### Enable business calendaring

Easily schedule events and business meetings by connecting SMS-based invitations directly to a recipient's digital organizer, like an Outlook or Google calendar.



### Eliminate wait times

Don't keep your customers waiting around all day. Text the ETA of a delivery or service provider, or use RCS messaging to track shipments dynamically.



### Get instant feedback

Run surveys using MMS to get instant customer feedback. Mobile makes it easy to respond quickly and efficiently to your customer's latest experience with your brand.



### Provide critical alerts

When immediacy truly matters—from fraud activity to business closings—automate your systems to notify and respond to inquiries in real-time.





# How business messaging enables better conversations

Your customer is already engaging with multiple touchpoints across the organization. From marketing to sales to customer support and beyond, business messaging offers a cost-effective way to power meaningful conversations in every department. The use of this simple technology is improving efficiency, prompting sales, inspiring loyalty, and facilitating important customer feedback.

To guarantee success and to harness the full potential of business messaging, be sure to act on these three key considerations:

## Be omnichannel and responsive

*According to Aberdeen, companies who provide an omnichannel customer experience achieve a 91% higher year-over-year increase in customer retention compared to organizations with more siloed customer experiences.*

To deliver a connected business messaging solution, cloud-based communication applications offer multi-channel platforms including web chat, social media, video, and mobile apps. However, to be truly omnichannel, you'll want to create high-quality customer experiences that occur within—and between—contact channels. Your communication applications will work best on a foundation that makes it easy for all employees to pivot from in-app messaging to SMS, or whatever channel the customer is on. Your technology should allow for tools to enable automation of processes like routing callers, sending alerts, notifications, and reminders without needing to write much code. And it needs to be simple for both customers and staff to use.





## Power intelligent conversations

---

According to *Harvard Business Review*, the top frustration among customers is having to repeat themselves.

Your customers expect the same level of service from every touch point. Your messaging, therefore, should follow the flow and intent of each conversation. Today's advanced technologies enable you to automatically monitor, analyze, and share the content and context of each message. By arming your employees with this data, they can have insightful, meaningful conversations on whatever messaging app they are on. In this way, the customer feels understood and engaged regardless of who is interacting with them.

## Understand and automate your customer engagement lifecycle

---

The lifetime value of a loyal customer can be ten times greater than the cost of their first purchase.

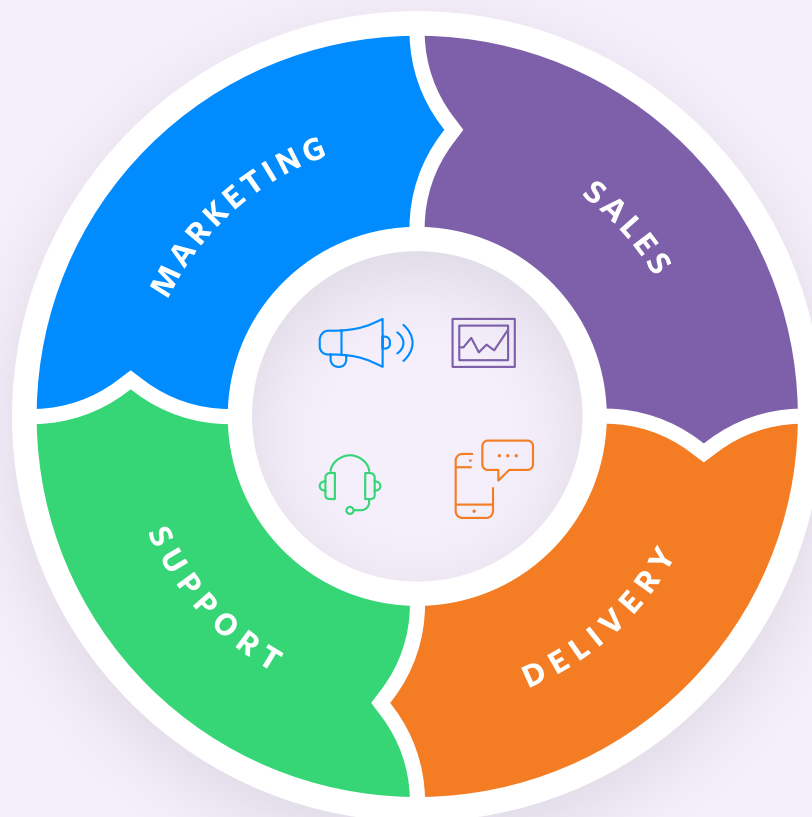
Business messaging is becoming increasingly important as a tool to engage, delight, and ultimately retain good customers. If you're like most businesses today, ensuring seamless conversations across departments and functions requires you to break down organizational silos and connect the dots across customer touchpoints. You can do that quickly by aligning teams around the Customer Engagement Lifecycle: a predictive - and cyclical - pattern in which you can develop more intuitive communications and customer engagement strategies.

For example, your customers may connect with your company's marketing team via Facebook, but ask sales questions on a web chat. They may opt to text directly with the delivery person, but choose to phone customer service directly to resolve an issue. By examining customer interactions at each stage of the lifecycle, you can automate many of these processes—delivering the right message with the right app at the right time—and still make them feel as if these conversations were tailor-made for them.



---

## EXAMPLE OF CUSTOMER ENGAGEMENT LIFECYCLE TIED TO BUSINESS



### MARKETING

- Send offers and promotions
- Conduct sweepstakes and competitions
- Get feedback with surveys

### SALES

- Receive product information over text
- Text a keyword to place an order
- Schedule appointments

### SUPPORT

- Process returns over SMS
- Issue fraud alerts
- Conduct text-based customer support

### DELIVERY

- Send notifications
- Make payment confirmations
- Deliver appointment reminders



## Business messaging customer spotlight

*Rinse seamlessly facilitates dry cleaning services with business messaging.*

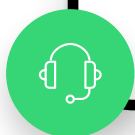
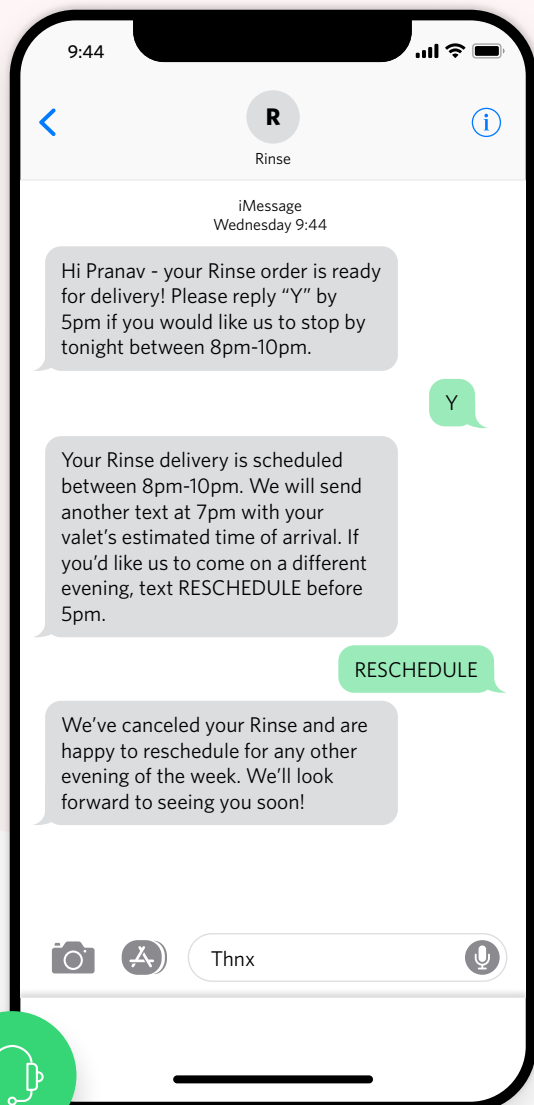
With APIs from Twilio, Rinse, an online dry cleaning and laundry delivery service, is able to provide secure and personalized multi-channel communications to streamline its offering. The diagram below represents how Rinse integrates marketings, sales, delivery, and support into a seamless, ongoing customer engagement.



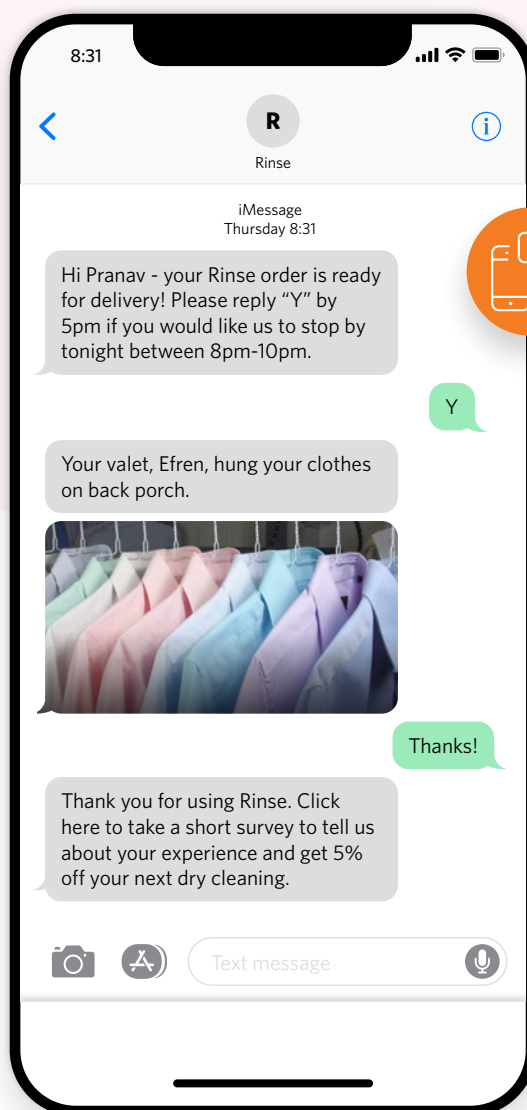


*Our goal is to make it seamless and easy for the customers at all times, Twilio SMS has been a core part of that experience.*

Ajay Prakash  
CEO, Rinse



See CEO Ajay Prakash explain how Rinse created an entirely new model for dry cleaning services using the Twilio platform. [Watch video.](#)





# What to look for in a cloud-based messaging provider

Business messaging is here to stay. No longer a 'nice-to-have,' it's a 'must-have': an essential part of the customer journey. To keep pace with these ever-evolving channel technologies, the cloud is the way to go. While business messaging apps can be integrated quickly and cost-effectively by leveraging pre-built APIs, not all cloud communication providers will offer what you need. Here are some key features and benefits to look for:



**Global reach:** Does the provider offer a superior global carrier network to ensure seamless and speedy SMS delivery to anywhere in the world? Can it scale to handle hundreds of thousands of users simultaneously?



**Flexibility and scalability:** Does the provider offer a solution that is easily integrated into existing software and CRM? Do they offer drag-and-drop features to allow front-line personnel to make interface and messaging logic changes on the fly?



**Integration simplicity:** Do they offer programmable APIs that can be customized to meet your unique business requirements and make it easy to integrate messaging into your overall communication platform or CRM.



**Feature-rich:** Does the provider offer the ability to send emoji, calendar invites, product carousels, location directions, polls, surveys, and video & picture messaging with RCS, MMS, and chatbot services?



**Language and speech analytics:** Are real-time translation services offered so that you can communicate with customers, automatically, and in their native tongue? Do they provide local numbers to improve open rates? Do they offer software to extract information from unstructured phone conversations and text messages?



**Predictive analytics:** Does the provider use data mining, statistical techniques, machine learning, neural networks, and artificial intelligence to identify relationships, patterns, and trends? Is this data easily accessible so that you can enable intelligent, contextual conversations with your customers?



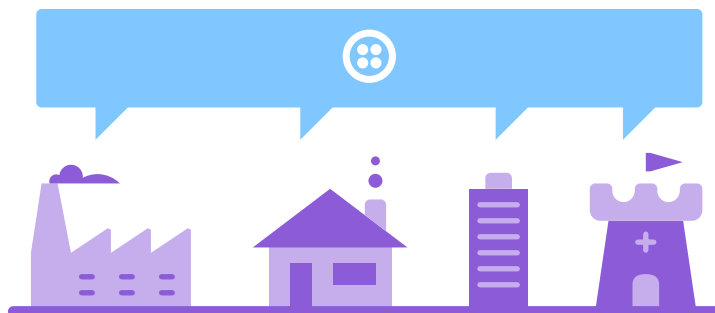
**Proxy and routing capabilities:** Will you be provided with proxy phone numbers to mask and protect personal phone numbers? Does the provider have easy-to-use tools to route calls quickly?



**Platform reliability:** Does the service level agreement meet the real-time demands of your business, and more importantly, ensure delivery of your messages without service interruption?



**Technology Innovation:** Is the provider dedicated to delivering ongoing enhancements that will support cost-effective and differentiated services well into the future?



## How Twilio can help you improve important customer connections

Whether resolving an issue, facilitating a purchase, or or creatively engaging your customers, simplicity is the key when it comes to business messaging. At Twilio, we believe your development tools should also be simple. That's why we've created easy-to-use cloud communication APIs. They'll help you drive intelligent, omnichannel customer engagements, fuel insightful, engaging conversations, and connect with your customers in a whole new way.

**Learn how Twilio can help you power great conversations with your customers:**

[Talk to us](#)



## Twilio products to consider



### Twilio Chat

Add chat to any app with SDKs for mobile and web.



### Twilio Programmable SMS

Send and receive text messages globally with the API that over a million developers depend on.



### Twilio Channels for Programmable SMS

Extend the capabilities of the SMS API to reach users on Facebook Messenger, LINE and RCS.



### Twilio Proxy

Keep people's identities private with proxied, one-on-one conversations over text, phone calls, chat, and messaging apps.



### Twilio Studio

Give employees a visual builder to design, deploy, and scale communication workflows, with a simple drag-and-drop interface.



### Twilio TaskRouter

Connect every customer to the right agent with skill-based routing for contact center workflows.



### Twilio Understand

Learn the structure and meaning of text using natural language understanding, powered by machine learning.





# Business messaging terms

## Common Communication Acronyms

---

### SMS

An acronym for Short Message Service, SMS is an alternative way to refer to a text message. An SMS is generally sent from one mobile device to another over a cellular network.

### MMS

Multimedia Messaging Service, also known as MMS, is a standard way to send multimedia such as pictures, videos, and other attachments over text messaging channels.

### OTT

Short for over-the-top messaging, OTT allows for streaming of audio, video, and other media services directly to the consumer over the internet.

### 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.

### 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.

### Application-to-Person messaging (A2P)

Otherwise known as application-to-person messaging, A2P is a one-way SMS to which recipients are not expected to reply. 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.



## Features to support communication channels

---

### Attribute-based and omnichannel routing

Enables businesses to route tasks from all communication channels to the most qualified available agents, based on defined attributes.

### Artificial intelligence (AI)

The ability of computer systems to perform tasks that normally require human cognitive skills, such as learning and understanding. Contextual analysis helps identify trends and topics within unstructured data, including documents, social media, email, and other text files.

### Omnichannel

Seamless and effortless high-quality customer experiences that occur within, and between, contact channels.

### Bulk Messaging

The ability to simultaneously send timely and straightforward messages to thousands or even millions of customers.

### Proxy

Refers to the technique used to protect users' private information by providing an intermediary number so that neither party can see the other's true phone number for voice calls or SMS. Also known as masked calling.

### Visual builder

A drag-and-drop interface that allows a person to adjust user experiences visually, without needing to code.

### WebRTC

A collection of communications protocols and APIs that enable real-time voice and video communication over peer-to-peer connections. Short for Web Real-Time Communication.

Thanks for reading.

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

[Talk to us](#)



© 2018 Twilio