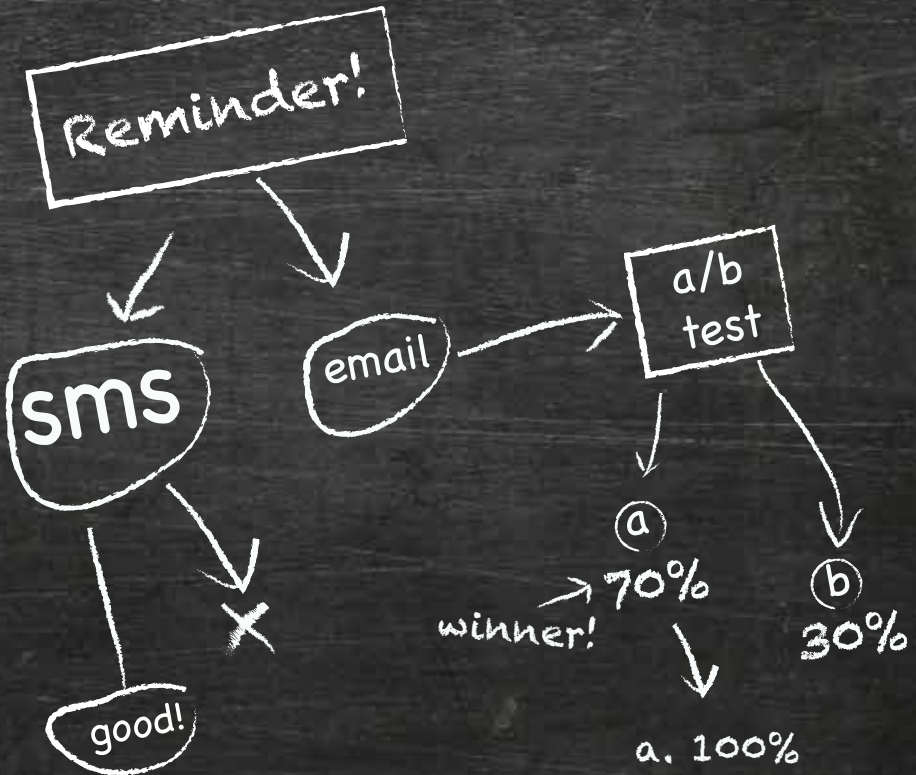




The Mobile Marketing Playbook

A Practical Guide to Give you an Advantage





Introduction

One channel to rule them all. Well ya, Gandalf, maybe in 2001, but with majority of Americans walking around with smart phones, there are now more ways to reach your customer than ever before. So why should your marketing and communication strategy be limited to just email, or email and [insert any social media platform here]?

In the not-too-distant past, some marketer started using the word “campaign.” The shortened definition of a campaign is a series of military operations intended to achieve a particular objective. Too often when we think of a campaign in marketing terms, we think, “We want to have a sale; it’s time to send a campaign to my database.” What ever happened to the part about a “series of operations”?

Our goal with this playbook is to give you a very high-level view of each component of a campaign that needs to be considered when communicating with your audience in today’s mobile world. We have dissected the DNA of a campaign and have created a simple way for you to navigate to the various elements that make up a good campaign that meets goals and objectives.

Like a good coach, we hope the next time you want to score, you make the right call and open up our playbook. It won’t always be possible to think of, or incorporate, every single play into your campaign. However, like a good checklist, you should at least be aware of the things that are critical to effective communication and, if you can, incorporate them into your campaign or communication strategy.

Welcome to the playbook. Now get out there and score one for your team!



Campaigns often go down the same way: Someone on the marketing team lets the person who is in charge of email programs know that a sale is coming up and they need to send a “blast” to their database. Sound familiar? We still live in a very reactionary world where we think about what needs to happen, and then we go do it. But data is changing this mentality.

Marketing is being flipped on its head.

Over the past decade, mobileStorm has delivered billions of messages to 109 million Americans. Like any savvy company these days, mobileStorm tracks how people interact with the messages they receive. As an example, we look for the most popular time of day a message is opened, what channel works best for certain offers, and from what locations messages are being viewed. We even track how people engage and respond to messages and the tolerance a subscriber has in receiving too many messages before unsubscribing. Data makes relevancy less of a guessing game and creates a “know before you go” capability.

There are literally hundreds of data points that can be tracked, and if you start to look for and organize patterns, then you can start to create a communication strategy that fosters loyalty, is relevant, and most important, wanted.



Let's revisit that campaign at the top of this chapter. Remember how the person in marketing asked the person in charge of email to send out a campaign to promote the latest sale? Well, how does the email marketing manager know that the 10,000 customers in their database want to receive an email, let alone at the very instant they are sending it to them?

Imagine a rules engine that literally stops you before you send a campaign to your database that says "We have five recommendations you should follow to improve your communication. Select continue for our recommendations." After selecting continue the system says:

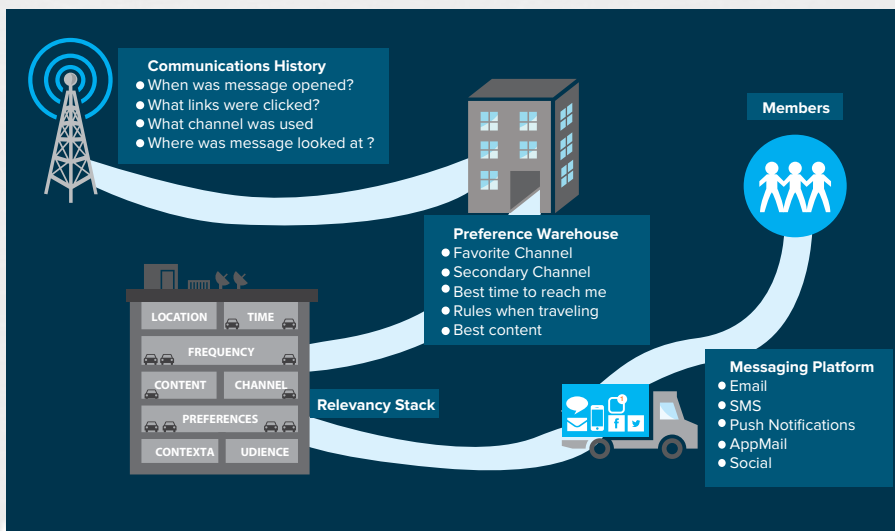
Communication Recommendations

10% of your list would rather receive this message at another time.	To have this message go out at the time that is best suited for your customer, Select <u>Yes</u> to Continue
55% of your list consistently looks at your email campaigns on their mobile device.	Select <u>Yes</u> to create a mobile optimized message
5% of your database will most likely unsubscribe because your communication has been too frequent	Select <u>Yes</u> to hold off from reaching them this time around
15% of your list is currently on the go	Select <u>Yes</u> to create an SMS or Push Notification
You now have reached your goal of 100,000 app downloads	Select <u>Yes</u> to turn this email into an AppMail and have it delivered to your mobile app's inbox



These examples are just a few of the amazing controls that you will have in the future as a marketer. But it's not only marketers that will benefit from this technology. Multiple industries, across many different businesses, will need to communicate to employees, partners, and customers. Communication will start to become more automated, and people will be able to get help and have conversations with smart systems before wanting to or having to interact with another human.

This playbook gives a first-hand account of what can happen when behaviors are tracked (see communications history in the graphic below), and consumers' preferences are taken into consideration. Together they form what we here at mobileStorm like to call "The Relevancy Stack." When you apply the relevancy stack to a platform that allows you to deliver messages across multiple channels, you have now given yourself the best possible chance at reaching your customer and influencing his behavior. Also, your job gets easier and you become more profitable as you automate your messaging rules to trigger based upon real-time behavior.



As you go through each section of this playbook, think about what you have to do manually to look like, and act like, a well-oiled data machine. Because in the not so distant future, your communication platform will be thinking about the next step for you.

Play on!



Elements of Good Design: The DNA of Campaign

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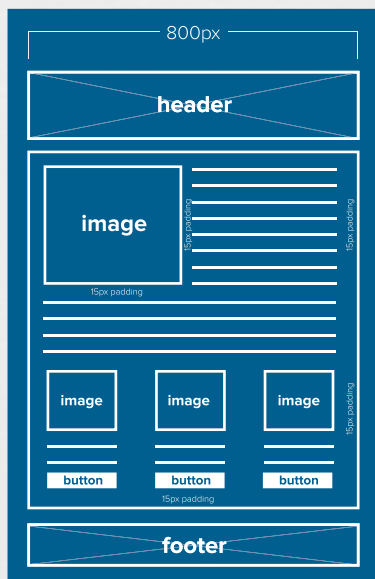


Overview:

No matter which channel you use to communicate with your customer, it's critical your design has a consistent look and feel. "Look" and "feel" are similar concepts, and they do bleed into each other. The look & feel of your template is about the layout you use, the pictures and artwork, colors, fonts, sizes, buttons, borders, and shadows. Good campaign design is about making sure that whatever message you are creating is following your brand's design guidelines, and with a fast glance your customer can quickly determine that the message they received was from your company versus another brand they might recognize.

Putting Into Practice:

The look and feel of a message can make a huge difference when it comes to credibility. Good and trusting design can be the difference of many more "opens," "clicks," and most important, conversions. Work with a designer who can take your brand assets and turn them into messages your customers will enjoy receiving.





Overview:

Your message will be received the best when it's relevant. What's relevant to one person is irrelevant to someone else. People that have an interest, characteristic, preference, or affinity should be grouped into segments in your database. An irrelevant message is as bad as spam and may ruin your chances of ever effectively engaging your customer. Before you send a campaign, plan out what segment of your database should receive it and ensure they are selected as the distribution list. Conversely, you should be able to create a set of rules that allow your subscriber to be automatically added to a segment that is based upon a behavior that you want to track.

Putting Into Practice:

Organize your lists of subscribers into separate audiences. An audience is a group that shares an affinity (a data element) in your overall database. For instance, segment your audience into subscribers who belong to your frequent buyer club or that you deem have VIP status. You could also segment people by the last purchase they made, have an age range of 18 to 34, and who have ever entered your stores geo-fence. Then, customize your message content to especially appeal to that segment. You could create this segment manually and create a campaign to drive them back in the store, or you could automate a campaign that will send out a special offer if your customer happens to hit the last purchase, age range and geo-fence threshold.

The key to managing your audience is to collect information about them that can be used to fine-tune the message.



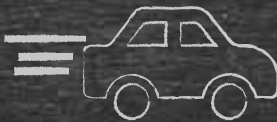
Overview:

You could create an amazing communication strategy, roll it out, and have it fail, only to realize that you have had it trumped by having huge numbers of your subscribers opt-out (forever!) because your messaging wasn't suited for them. Your strategy won't matter if it doesn't respect the customers enough to let them have some control over how they want you to communicate with them.

Putting Into Practice:

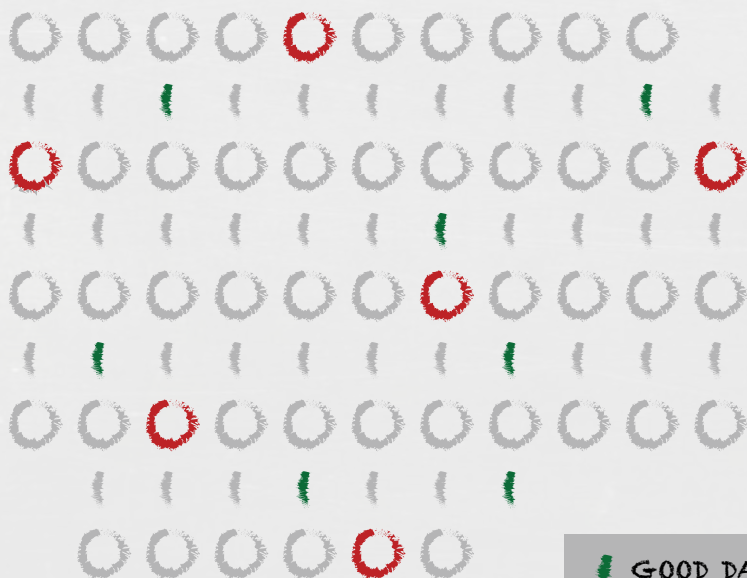
Offering an easy-to-access preference center that enables the subscribers to manage what, how, and when they would like to receive communication from you will go a long way to building trust, credibility, and relevancy. A good preference strategy is one that allows the subscribers to customize communication between themselves and you.

Most of us by now are familiar with the usual preferences that allow us to change our email address, unsubscribe our email address, or change the email content type from HTML to Plain Text. Another popular preference is to allow removal from one particular list or removal from a certain channel (email or SMS for example).



As your marketing becomes more data driven, personalized, and occurs across more channels, you will want to offer more preference choices to your audience. For example, your audience should be able to set a quiet period for SMS between the hours of 8:00 p.m. and 8:00 a.m. or priority messaging that will continue to send you messages until you respond. One of our personal favorites will make use of a smart phone's accelerometer and will allow someone to halt or continue messaging depending upon whether he is driving a car or has stopped his car.

Everyone wants to be heard. Continually ask your consumers about their preferences and follow their preferences to strengthen your relationships (and your success rates).





Overview:

Time is a very important factor when it comes to reaching your customers. Sending a message at the wrong time can have a dramatic effect, and not in a good way. Conversely, if you reach someone at the right time, it could result in a happier customer or a new sale.

When is the best time to send an email, text message, or push notification? There are a number of studies on this topic – but unfortunately many different conclusions! The truth is that the right answer for YOU depends on a number of different factors such as the type of business you have and what content you want to communicate.

Putting Into Practice:

Before sending a campaign or creating an automatic trigger really think these elements thru:

- How does your demographic skew?
- What are your consumer's preferences
- What is the content that you want to communicate?
- What channels you are using?
- What action you're asking your consumer to take
- What time zones are you sending to?
- What time will it be by the time your messages reaches your customer?
- What day is it? Weekday? Weekend?



Some rules are simple: Don't send people a marketing text message at 3:00 a.m. in California. Actually, it's the law, and sending after 9:00 p.m. or before 8:00 a.m. in your customer time zone could violate the Telephone Consumer Protection Act (TCPA).

Send your message with an appropriate lead-time for the consumer to take action. Understand when your particular messages/offer will get the best results by testing and analyzing responses. And, don't forget to test across multiple channels. Email? In-App Message? SMS? Push? Find out what times drive the very highest engagement rates and stick to that schedule.





Overview:

How you reach your audience is almost as important as what you say when you reach them. For example, what if someone came to your house during dinner and when you answered the door they screamed, “YOUR MONTHLY FREQUENT FLYER REPORT IS READY. PICK IT UP AT OUR WEBSITE”? Then, they just turned around and walked away. Using the right channel is critical when it comes to making the right marketing play. All digital communication channels have now converged on the smart phone. Think about it: you can now even pick up a fax on your cell phone. It’s now possible to reach any male or female across any age range or demographic on a smart phone. But each demographic has taken to its favorite channel. Instead of one size fits all, choose the channel mix that’s right for different segments or groups of users in your audience in order to maximize your results. Your audience might skew more social media than email or SMS than push notifications. It no longer makes sense to only use one channel to reach your customers, just like it makes no sense to use multiple platforms to create and manage campaigns for the different channel types.

If you want to develop a database and garner interest in a new channel, you need to articulate the value to your customers. Each channel should bring something different. You shouldn’t present the same offer on Twitter as you would SMS. If you cannot articulate the value of each channel and what he should expect from subscribing to that channel, then you should not expect your customer to opt-in.



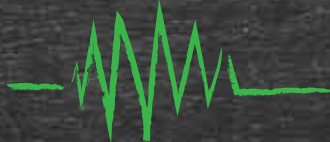
Putting Into Practice:

Let's look at a few channels and some attributes that can hinder the channel or make it successful:

	Pros	Cons
SMS	Engagement: 99% are read within 3 minutes.	Limited: You only have 160 characters to work with.
	Conversational: You can automate a two-way conversation with your customers.	Security: You would not want to deliver PHI or Financial information via this protocol.
EMAIL	Rich: Content wise you are able to use many rich elements such as video, images, fonts, and colors.	Deliverability: Only 75% of messages make it to the inbox due to false positives and aggressive spam filters.
	Reporting: You can capture many different data points such as opens, clicks, how long someone has read the message for, what section they have read and if they socialized your message.	Churn: 33% of your database will churn every year due to people changing jobs, switching email services and using throwaway accounts.
PUSH	Awareness: You might as well not have a mobile app if you aren't using push. Push can bring you repeat use, by as much as 18% - 30% per day.	Adoption: Its not always easy getting someone to download your app, let alone agrees to receive messages from it.
	Cost: Carriers charge for SMS, but because push is sent via the Internet protocol and not thru carriers, its cost is relatively inexpensive.	Content: Push does not offer a very rich content experience like an in-app message or email.



SOCIAL	Viral: The very nature of social, allows for ideas to quickly spread; getting you more eyeballs than you might know what to do with.	Database: Unlike an email or SMS where you can capture and store someone's contact info, you cannot database. Twitter handles the same way and market to them.
	Interactive: Social allows for the posting of rich content and for the community to debate and comment around topics, making it an incredibly interactive experience.	Costly: In order for social to have an impact, there should be a strategy for each channel. This means creating unique content for each platform which is expensive.
VOICE (IVR)	Adoption: Everyone has a phone and everyone talks on it. You might not be able to get someone on the phone, but you are guaranteed to reach them.	Experience: Carriers report that voice minutes are radically being reduced. People are giving up their home phones and talking less. Plus, a phone call interrupts someone's day, verses seeing a message come in that they can decide to respond to later.
	Automation: With voice recognition and interactive menus, you can automate a lot of the communication experience, reducing your expense at a call center.	Value: Voice calls or IVR systems make a lot of customers feel like they are not valued enough to receive a personal call or to speak with a live person.
IN-APP MESSAGE	Security: Because these messages are served up over the Internet they can be encrypted, and important health or financial information can be included within the body of an in-app message.	Adoption: 65% of American's have smart phones and as a result, there are now over a million and a half mobile apps in the app store. Its not an easy task when it comes to driving the adoption of your app.
	Optimized: In-app messages are designed to look good in a smaller screen experience and are geared towards helping the subscriber engage and get information as quickly as possible.	Habits: In-app messaging is the newest mobile communication channel so the industry is in education mode. Consumers need to form habits, and realize that they can log into an inbox with an app, and receive personalized messages relevant to them.

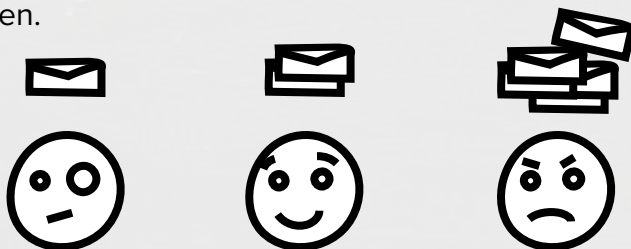


Overview:

Frequency plays a critical role in making your customers happy and engaged; send too many messages and you are bound to have people opt-out. Send too few messages and you could also receive opt-outs, or worse, have a message blocked by an ISP because they feel your audience is not very engaged with your communication.

Putting Into Practice:

First off, let's manage expectations. If you happen to send out a daily joke, then make sure people know it's daily. Likewise make sure you can capture your customer's preferences and give him the ability to customize how often he would like to hear from you. Think about the channels you are using to engage. SMS and push should be reserved for more immediate notifications, as it will interrupt someone's day. However email is less intrusive and might be a channel you want to use more frequently. Finally, look at the data. If you notice that you have a higher unsubscribe rate on a particular campaign, check out how frequently you are sending it. Match that up with your engagement reports or your conversations. If you send it frequently, but engagement and conversions are low, yet opt-out rates are high, you might be sending that campaign too often.





Overview:

The best messaging campaigns have an element of interactivity. Don't follow a "Spray and Pray" model: ask for an action in your messaging and track the responses. If you craft your request so that there's something in it for your consumer to follow up – additional information, an added benefit, a chance to get more – you'll not only be able to measure your message's success, you'll be opening a two-way, digital dialogue and building your relationships through messaging.

Putting Into Practice:

Not all channels offer the ability to engage in a two-way dialogue, so use a channel like Push to notify your customers they have a new in-app message, and when they navigate to their inbox, you could poll them. Using an automated dialogue tree, you could continue to automate questions based upon the previous response. As an example, you could ask someone if he has remembered to take his medicine, which happens to be a small, three-hundred-billion-dollar-a-year problem in America. If he responded with "no," you could ask a follow-up question and drill down further. If one of your poll questions was, "Did you forget to take your medicine" and he says "yes," then you could automate a third question, asking him if he would like to be put on an SMS or Push reminder program. You really could create an entire conversation without ever having to pick up the phone. As a bonus, you could use technology like location (another element of good campaign design) to trigger out a message when he is leaving his appointment and use this type of engagement, as an opportunity to find out how his experience was, or if he would tell his friends about his positive experience with you.



Overview:

Millions of people are interacting with digital messages every second of every day. They are opening messages, clicking on links, sharing with their friends, reading specific parts of a message, looking at messages on a certain device, at a specific time or location, or via a specific channel. All of these behaviors can be captured; triggers can be set up to reengage with your customer once a certain threshold is hit.

Putting Into Practice:

Find a platform that really lets you customize messaging rules based upon many different types of behaviors. Start to create a workflow of how someone would receive your message after he has come into contact with your message. Categorize these workflows into business use cases. For instance, if you run an online store, you might want to create a rule that triggers out an offer for free shipping if someone did not finish checking out. You could file this workflow under “shopping cart abandonment.” We are moving closer towards a world where data is deciding the best way to communicate and by creating re-messaging rules that are driven on behavior, you are moving one step closer to become a marketing prophet.



Overview:

“The President has been shot!”

Did you have to read that again? Think about the importance of headlines. They can make or break a content-based organization . Creating the right content means giving your customers the right mix of copy, images, and video. Your message needs to be a complete content experience. If you only have 160 characters, then you really need to make it count. If you are not restrained content-wise like an email, then you also need to make sure someone will want to open your email, and then after opening it, scroll down.

Putting Into Practice:

Content is KING in whatever kind of communication you’re doing. It’s almost always best to ensure that the majority of your content fits with the demographic you are communicating with. Using SMS shorthand might be great for an entertainment brand but not a financial institution. Tailor your message to appeal to the target you are going after. Also, it is critical that that you test which content is getting the most interest in the form of tracking behavior, engagement, and conversions. Finally, before you send anything make sure to test, internally as well as externally, with a variety of stakeholders and consumers. Does your message have appeal? You will know quickly whether or not you need to change your content or keep doing more of what you are doing.

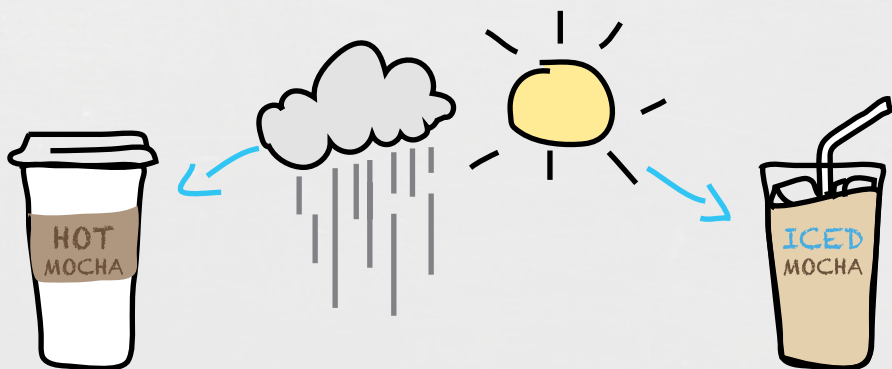


Overview:

If content is king, than Context is the kingdom. Context is about taking things that are happening in real-time all around you and incorporating that information into your customer's communication stream.

Putting Into Practice:

For instance, you could create a rule that enables a push notification to reach someone close by your coffee shop offering them to come in for a mocha. If you were tied into a weather service, your communication platform would know it was cold outside and your message could be personalized with a token that replaces `##weather##` with the word "hot." Your customer would be offered a hot mocha vs. a cold one. However, if it was hot outside, your message could dynamically change to say, "Come in for an iced mocha!" Just like a retailer won't run a big promotion on snow-blowers in July or push swimwear sales in December, context is a cornerstone of relevance.





Overview:

With mobile apps driving the location revolution, there are more services out there now that make our lives easier, simply by allowing a company to know our whereabouts. You will only get your customers' permission to know their locations if you are offering them something of value, but if you get creative, then you have a good shot at building a very valuable location database.

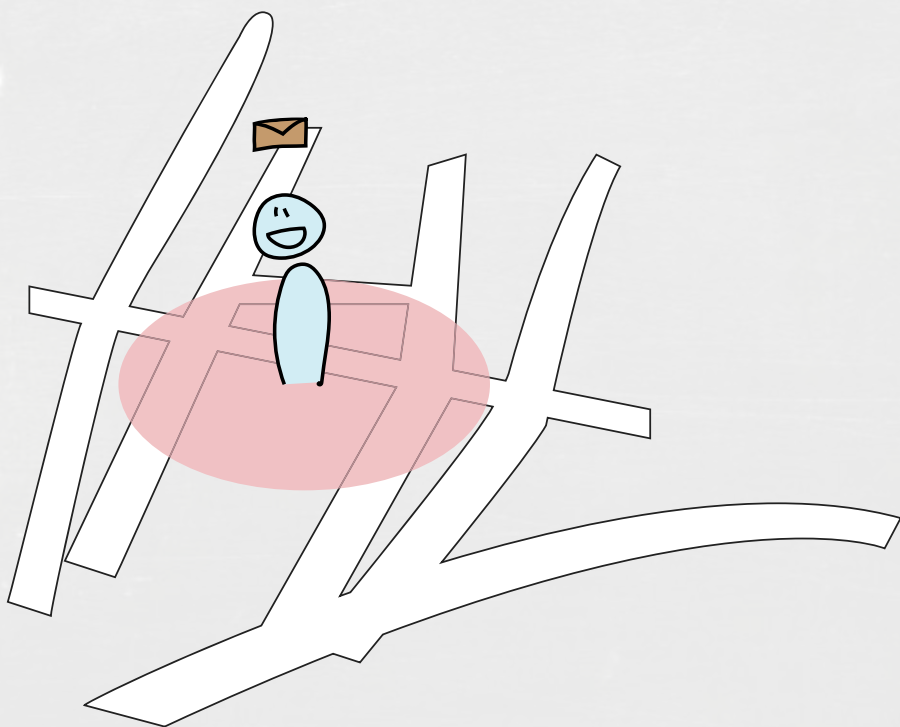
Putting Into Practice:

There are two ways to use location effectively: time-based location and real-time location. For time-based, you would simply run a query at a specific time to see if any of your customers were in an area at that specific time. For instance, a concert promoter could geo-fence the stadium a concert is being held at and push a message thanking everyone for coming out. Or a casino could geo-fence their competitors' properties on a Friday night and at 6:00 p.m. find out how many of their players are hanging out somewhere other than their casino and push out an offer for those players to come into their casino.

For real-time location, you would simply set up a rule that would often have a subscriber pinged to see where he is. If that person was within a certain range of the geo-fence, then he could automatically receive a message with an offer asking him to come on over to their location.



However you use location, make sure your customers do not feel like you are big brother. Provide value and manage expectations and you will be surprised how many people opt into your location strategy.





Overview:

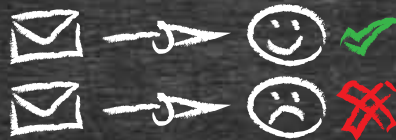
The journey of 1,000 miles begins with the first step – and it makes sense to have your first step in the right direction. We all know that planning is key, but sometimes, specific goal-setting gets pushed to the back burner in the rush to just get going. Let's all take a deep breath and count to 10. And don't stop when you get to three! Ultimately, your goal will depend on the purpose of your message.

Putting Into Practice:

Whether it's just making sure that your audience has seen the message, or measuring the rate at which your audience follows up by clicking, calling, or redeeming – set goals that can be confidently tracked and trended for each step in your overall campaign. Make sure everyone on your team, including your service provider, knows your goals. Do not let anyone engage with your project if he is not willing to try and help you hit your goals. Make sure your campaign goals are visible throughout your organization and that people are willing to hold people accountable.

If you are not reaching your goals, meet often and re-adjust. If you have never hit your goal, then maybe it's the wrong goal. There is a saying, "If it moves, measure it."





Overview:

Multivariate testing is the process of looking at more than one variable when evaluating your results. Establish your testing to be able to clearly spot which variable is having an impact. In traditional A/B testing, this means testing by changing a limited number of factors in your message.

For instance, if you want to test for the most effective campaign to sell an item, you don't want to have the "A" test and "B" tests containing different offers, different ways to redeem, different look and feel, different audiences, etc. You won't know which of the variables worked.

Putting Into Practice:

If you can possibly find the time, sending multiple test messages – each with a different variable – is the most effective means to find the tip-top, optimum mix to achieve your absolute best results. If you're like most people, you don't have unlimited time to spend **on one campaign**. So the answer is to plan over several or many campaigns to constantly test different scenarios. It's better to find out in a couple of months rather than never know what really works. Each channel will offer a different way to test. For instance, with SMS you could ask one campaign two different types of questions and see which SMS had the better response. With Push, you could find out which short message had the most "view" touches. And finally, with email you could test which subject line garnered the better open rate. True marketers message, but real marketers test.



Overview:

The term 'Best Practices' generally refers to a collection of steps, rules, and even laws that a marketer should (or is required to) take or implement if he wants to go about collecting, building, and marketing to a digital database. Best Practices are basically common sense guidelines for the most part, but they should also include some legislation like the CAN SPAM ACT or the TCPA ACT for email and SMS respectively. However, even if the rules and laws don't apply, ISPs and Carriers have their own rules. They have the right to deny the delivery of your message at any time. Proceed with caution. Also, your subscribers have ultimate control. They are the owners of their inboxes and devices. They have the right to say who can and who cannot message them.

Putting Into Practice:

A few of the most common best 'Best Practices' across most channels include:

- Double Opt In; Confirming email addresses at the point of sign-up
- Clear definition; what types of messages one will be receiving? Make sure your end users know exactly what they are signing up for



- **Message Frequency:** This is a biggie! Make sure you are informing end users of how many messages they will be receiving in a given time period

Make sure that when you are collecting data for marketing purposes you are following the well-established guidelines, laws, and best practices already put in place by the Government and Industry. If you're not sure about these laws and guidelines, then consult with a digital marketing expert.





We really hope you enjoyed our playbook. mobileStorm has been in business since 1999, focused on helping companies with one very simple concept: “How do I reach my customers, engage them, and influence their behavior to drive revenue or reduce costs?” We actually start from the consumer experience and work backwards. If the consumer is having a bad experience, then our client will fail which means we will fail. Now with mobile, message interaction needs to not only be very easy, but it has to just work and work fast.

We want to help as many businesses as we can become as relevant with their communication as possible.

If you are interested in having us come into your company and set up a communication strategy that encompasses many of the plays in this book, then please email or call us at your convenience. We offer online training courses of our platform and strategy, as well as complete on-site visits and workshops.

So what are you waiting for!? (Sorry, we couldn't resist sounding like an infomercial just now). We would love to hear from you!



about mobileStorm

Since 1999 mobileStorm has been helping marketers and healthcare organizations reach consumers and influence their behavior on mobile devices. Our mission is to help our clients communicate with the most amount of relevancy possible. To accomplish this mission we have created an intelligent cloud-based communication platform that enables our clients to create, send, and analyze multi-channel campaigns (email, sms, push and in-app messaging) in three simple steps. Thru integrated campaign management and reporting, businesses of all sizes can create interactive messaging workflows that tackle important aspects of their business that focus on increasing revenue, and decreasing costs. We have delivered over five billion messages on behalf of thousands of customers, and in the process, have reached over one third (1/3) of all Americans. Our clients include some of the most prestigious and important brands in the country such as NASCAR, Kaiser Permanente, Boyd Gaming, CVS Caremark, New Balance Shoes, Coach, Humana and Anthem/Wellpoint.

The World's Gone Mobile, Take it by Storm

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