



# Hello and welcome!

While we wait for everyone to join,  
share in the chat:

**What is your favorite destination for summer vacation?**




 This session will be recorded

# A few things before we start:

## Chat




 Valentina Benaglio 11:28 AM  
I'm calling in from NYC!

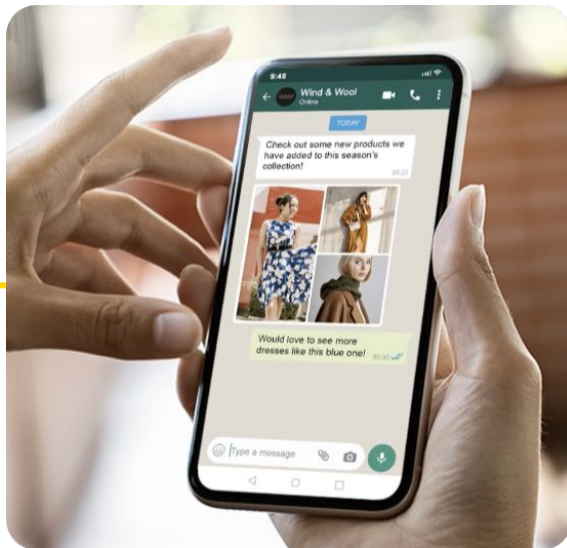
## Q&A

 Valentina Benaglio 11:28 AM  
Does this apply to only promotional emails  
or to transactional emails as well?

 1

## Docs

-  Navigating Gmail and Yahoo's Deliver...  
Click to open
-  Gmail and Yahoo's New Email Sender ...  
Click to open
-  Email Deliverability Tips  
Click to open
-  The Ultimate Guide to Mastering Emai...  
Click to open



# Mobile Messaging

How to drive **omnichannel** with **Bloomreach** through the use of **mobile messaging strategies** for your business



# Meet The Host and Speakers



**Michal Blaško**

Sr. Business Consultant,  
**Bloomreach**



**Nicole Khoury**

Senior Product Manager,  
Mobile Messaging,  
**Bloomreach**



**Kristián Tomáš**

Product Marketing  
Manager,  
**Bloomreach**



# Agenda

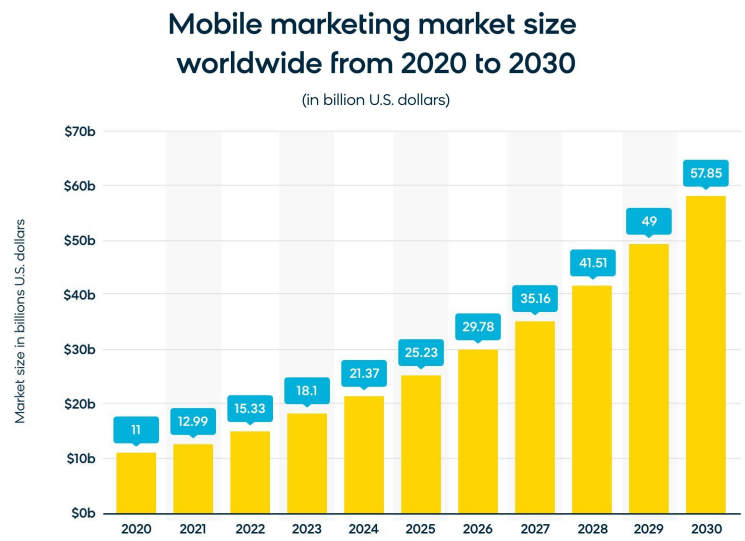
1. State of Global Mobile Messaging market
2. Optimizing SMS, Transactional SMS, and WhatsApp strategies
3. WhatsApp vs SMS Features and Use Cases
4. RCS & More Features Coming Soon
5. Q&A

# State of Mobile Messaging



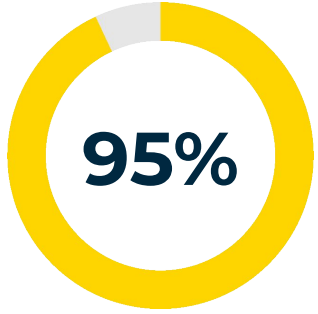
# Mobile experiences are becoming mobile-first

Mobile messaging is here to stay. 4.88 billion people around the world own smartphones, and that number only going to grow.



- ✓ **Mobile is the default way we go online**
- ✓ Online experiences are becoming **mobile-first**: pages that are mobile friendly, all the checkouts are optimized, brands use augmented reality
- ✓ Consumer behavior change: Increase in usage and shift in intent
- ✓ Catering to these mobile consumers
- ✓ They exceeded \$430 billion in 2022 and are projected to reach **\$710 billion by 2025**.

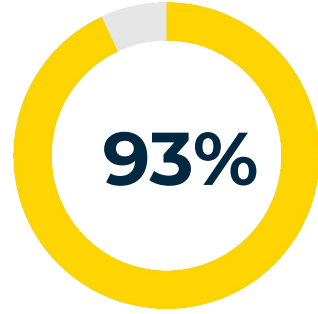
# Mobile messaging



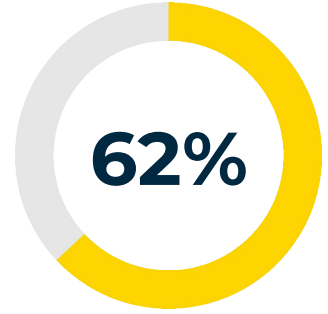
of text messages are read and responded to in <5 min



of all text messages get opened



of consumers have a more trust in text messages than email



of consumers have subscribed to get text messages from at least one business



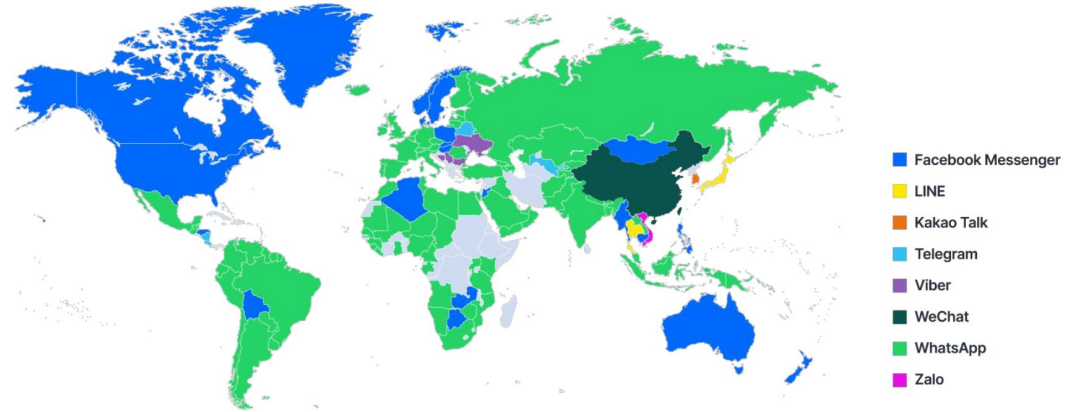


# Mobile messaging adoption

WhatsApp consumer adoption varies widely across the globe. For example, India has over [535 million people](#) using WhatsApp. Even within Europe, adoption varies from country to country.

[Denmark has the lowest usage of WhatsApp](#), while [in Switzerland, 95.9%](#) of the population uses the platform.

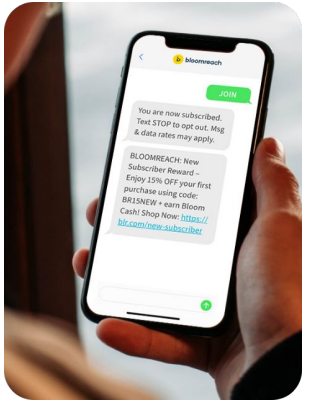
Even within the US (where SMS still dominates), you might serve customers globally or have US customers who like to use WhatsApp. After all, there are 98 million WhatsApp users in the US, with [53% of them utilizing the app at least once a day](#).



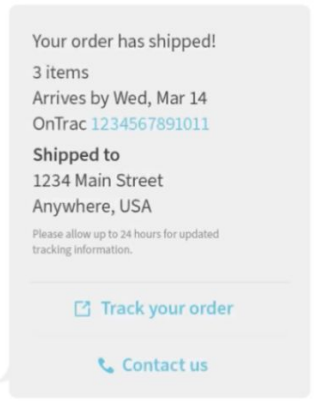


# How Bloomreach powers your mobile marketing strategy

## SMS/MMS



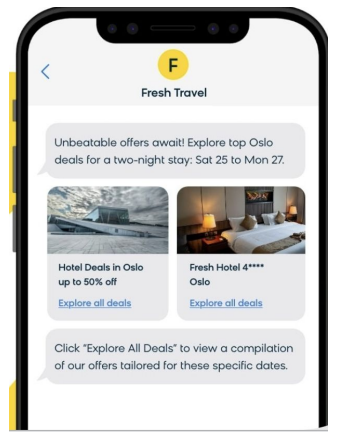
## Transactional SMS



## WhatsApp



## RCS Incoming!



**SMS**

# SMS campaigns

## OVERVIEW

The same functionality you love for Email Campaigns, now for SMS! Easily create and send one-off SMS or MMS campaigns with our new visual builder. Preview and test every message before you send. Use the evaluate tab to quickly view campaign performance.

## USE CASES

### Quickly send timely messages

Drive urgency (and conversions) with a flash sale, seasonal sale, or limited time promotion on the channel they are mostly likely to engage with. Don't forget to send a last chance reminder!

### Give subscribers early access

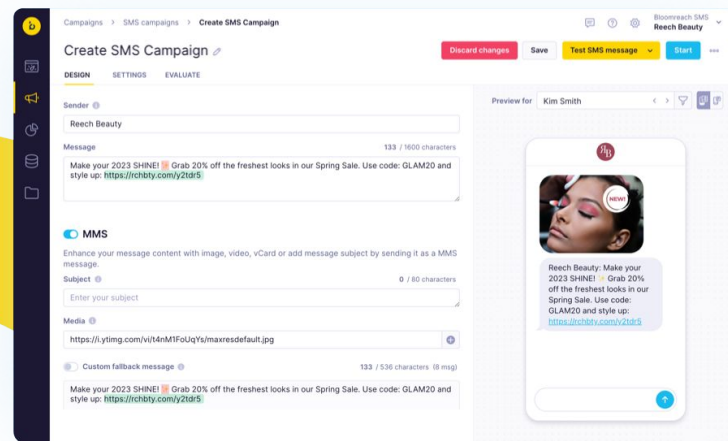
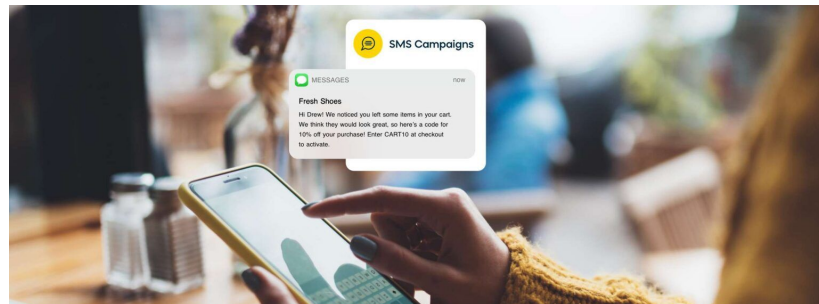
Give SMS subscribers early access to shop new products or limited edition items with a timely text.

### Make customers feel like VIPs

Give your most loyal SMS customers the royal treatment with access to exclusive sales, content, and products.

### Make it personal

Use zero-party data and personalized product recommendations to make every message feel personal.





# Previous SMS Best Practices Sessions

## Deep dive into SMS & MMS campaigns

SMS is a marketing tool that is increasingly climbing up in popularity. With our experts, you can learn how to make the most of it! During the session, we'll talk about:

- Understanding your SMS strategy
- SMS Best Practices
- SMS Housekeeping
- SMS Use Cases



## SMS Best Practices Session Webinar

Link to Best Practice Webinars [here](#)

## NEW Engagement SMS Course!

Bloomreach Academy's **Engagement SMS Course**, delivered by a top Bloomreach Engagement Subject matter expert, consists of 5 easy-to-digest sections that will guide you through the key, value-driving benefits of SMS as a marketing channel.

- In this course you will:
- Learn about the product features, capabilities, and best practices
  - Be guided on SMS fundamentals, consent and compliance

If you're interested in registering for this course, please follow this link or visit the academy website.



### What are the benefits?

<b>1</b> <b>High-level</b> You don't need any prior knowledge to be able to follow-along and comprehend this course	<b>2</b> <b>Self-paced</b> The on-demand course structure allows you to learn at your own pace, on your own time!	<b>3</b> <b>Best Practice</b> Get key insights into the best practices that will kick-start your SMS campaigns for immediate results.
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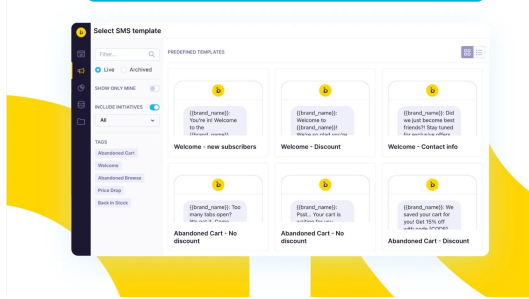
## SMS Academy Course

Leverage the power of SMS in this fully on-demand course covering key, value-driving benefits of SMS as a marketing channel. **Learn about the product features, capabilities, and best practices. Be guided on SMS fundamentals, consent and compliance**

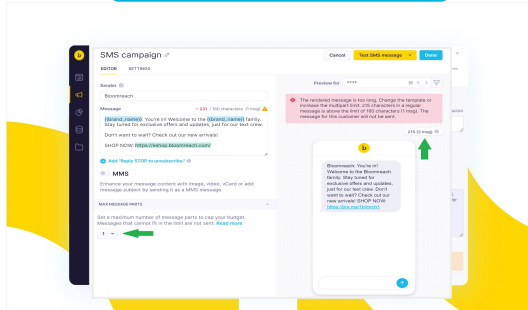


# Some Bloomreach SMS features

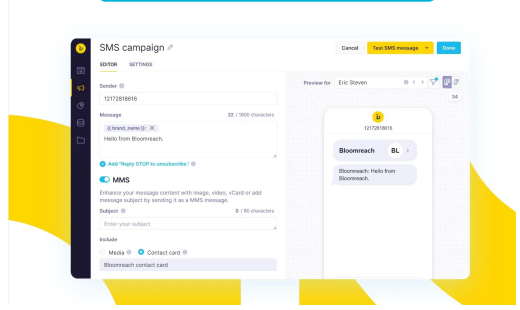
## Pre-built SMS Templates



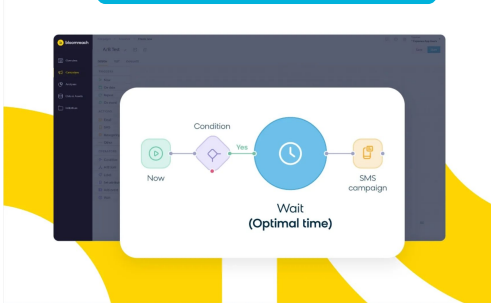
## SMS length calculator



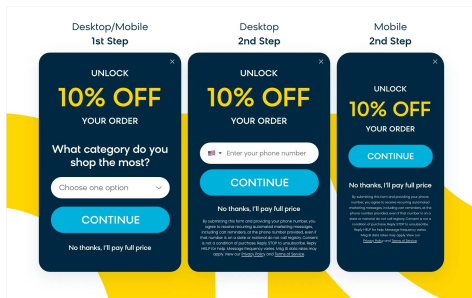
## Contact Card Generator



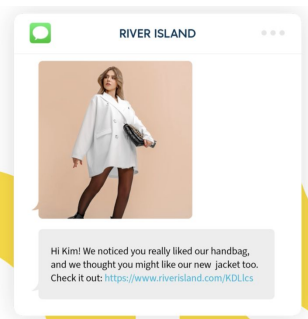
## Optimal Send Time



## Sign Up Units



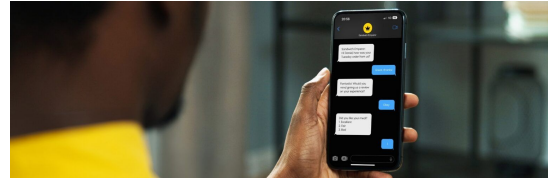
## Product Recommendations



# SMS optimisation



# SMS Housekeeping



## Character Limit

Shorter messages tend to perform better than longer-form messages.

There is a limit on the size of one SMS - **160 characters** or **70 characters if you use special characters**.

1. Be considerate of **dynamic content**: ex. First names of 4 characters vs. 9
2. **Emojis/ Special characters: Including an emoji or a special character** shortens the SMS character limit from 160 to 70 **(Latin based languages it won't affect it)**
3. Bloomreach Engagement provides an option of **multiple messages**, so your text will be sent in more than one SMS but the client will see it as once
  - a. The editor also displays a 'characters counter' and automatic highlighting of special characters
  - b. You can **define the maximum message parts** a long message can be split into. The allowed range is from 2 to 8 message parts.
  - c. If the previewed rendered message is too long, it explains why it will not be sent

```

16
sms_x
sms
See3841d87fa905f07c6d83f
delivery reports test (Tomas)

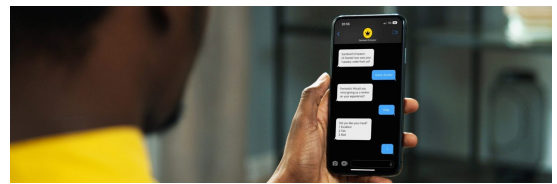
Message parts count (6) is greater than allowed
18 Jun 2020, 12:02
enqueue_failed
  
```

***Your provider will charge you for each SMS separately, however, your customers will see the message as a whole***





# SMS Housekeeping



## Frequency

**Segment Your Audience:** Tailor the frequency of messages to different segments of your audience: Loyal customers, sms clickers, recent browsers, recent purchasers

**Consider the type of content:**

- Is it an important announcement/ big sale? Target everyone with at least 4+ per month
- Automation and behavioural based messages? -> 3+ per month / as needed
- VIP specific content / early access etc -> 2/3 per month
- Ad hoc messages: depending on the engagement and segment. For high engagers at least once or twice a week. Track success and experiment with increasing message frequency to 6 - 8 messages per month

**Monitor Performance** and adjust: understand the impact of message frequency and create health list segments

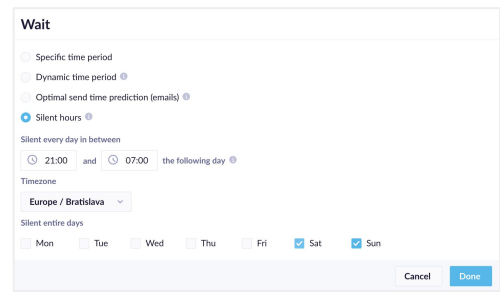
**The #1 reason for unsubscription with sms is receiving too many messages**

## Silent Hours

You can use Silent hours to **temporarily pause the sending of your campaigns** to the customer **during times when you do not want to disturb them**, such as **late in the evening or early in the morning (after 9 pm and before 8 am in the recipient's' local time zone.)**

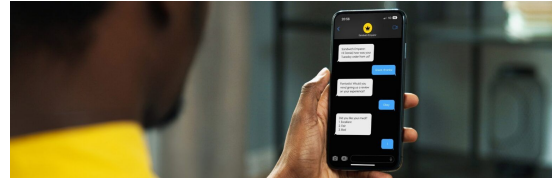
**How to set it up? 2 ways:**

1. **Wait node:** If this node is entered during silent hours, the scenario will wait under their end and only then send the campaign.
2. **Globally in Project settings > Campaigns > General Campaigns** settings. This will pre-fill a Silent hour Wait node when it would be selected in a scenario.





# SMS Housekeeping

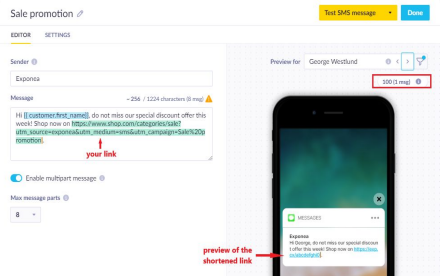


## Link Shortener

**Hyperlinks** are often used in marketing campaigns to drive traffic to landing pages from different channels. However, the number of characters in an SMS/MMS is limited and if you want to send personalized links, you will find out that these are too long and not very appealing in SMS/MMS messages.

**Link shortener** automatically replaces all hyperlinks in the text of the campaign with its shortened version. Every click on the shortened link is automatically tracked as campaign event with status clicked.

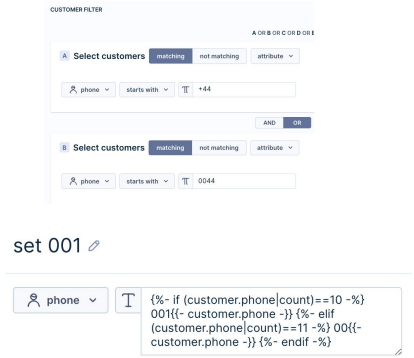
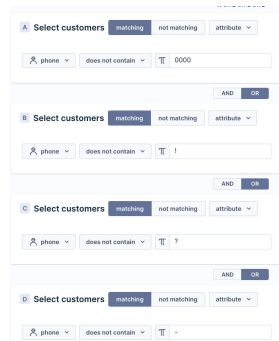
**Include a link as a CTA:** This simplifies access to visit your site, allowing you to track your click rate and evaluate your performance.



## Phone List Hygiene

It's important to keep your phone number list healthy: that you make sure the numbers you're sending to are in the right format, valid numbers and that you're sending to the correct country you're registered with.

1. Check for **invalid numbers** (ex. Including special characters, '0000')
2. Conditions to **check the right country is being sent to**
3. Check the **syntax of phone numbers** (+44 or 0044)
4. **No more than 11 characters or not less than 9 characters** (applies globally)



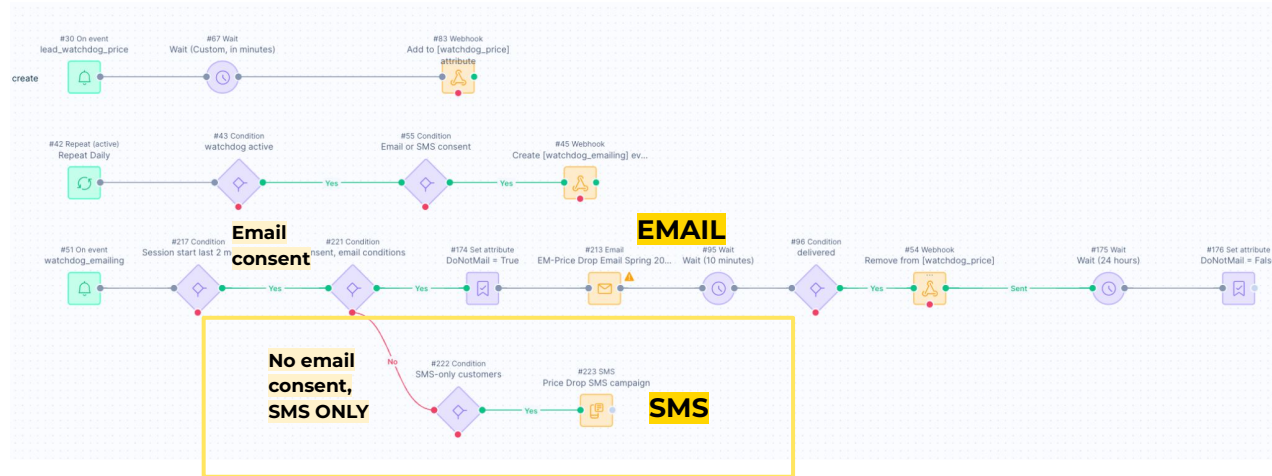


# Quick Win: Incorporate SMS in Automations

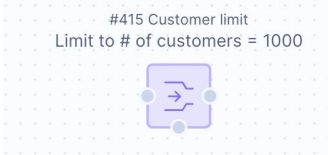
## Include flows for SMS-only customers in your automations

- Customers who are **opted-in to ONLY SMS** are a **great audience to work with!** The only way these customers can hear from the brand is sms and **they are be missing out on automations who are only targeted by email.**
- **How to make it omnichannel? (And quick win!):** add a flow in the automation which **checks if customers are not opted-in to email**, to **check if they are to sms**; and all it takes is adding the sms creative (since we already have the UC built out!)

➤ **Price Drop Automation** is incredibly powerful with SMS -> **time sensitive and urgent**



**! Sometimes you can be quite restricted with their sms volumes but you can always add customer limits passing through to limit.**



# Transactional SMS



# Transactional SMS

## Summary

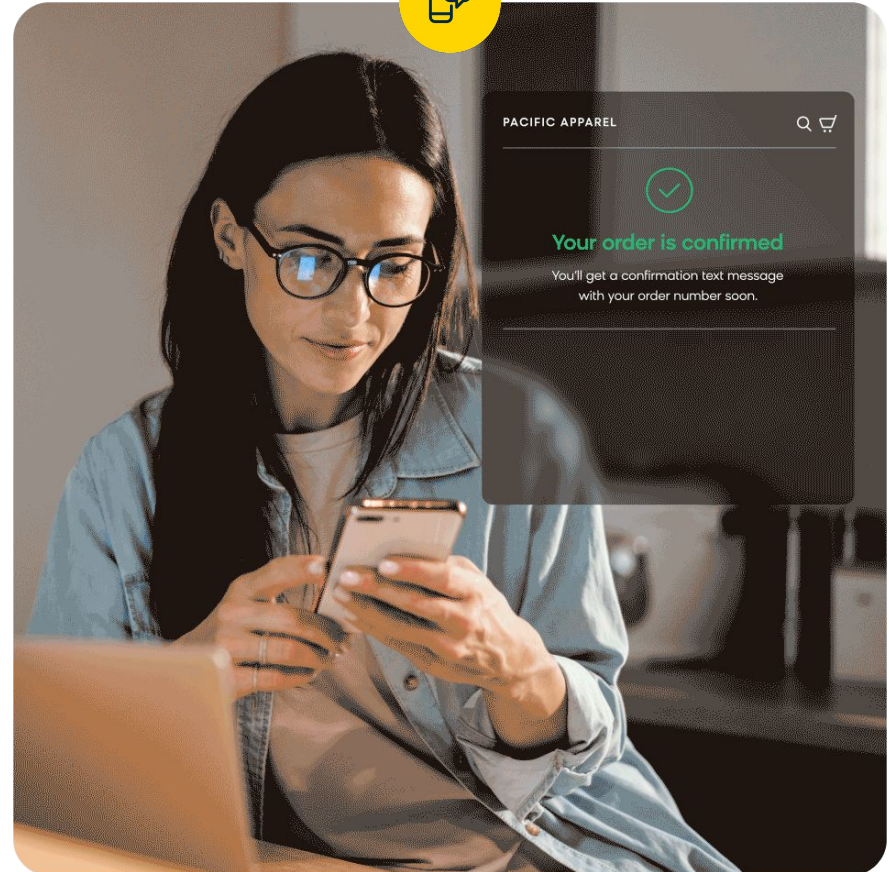
API-based feature allows clients using external 3rd-party tools to **trigger & send real-time Transactional SMS from Engagement** and provide **evaluation visibility** within our platform.

## Problem / Use Cases

Users want to **expand** into **new mobile messaging strategies**, increasing channel depth to meet consumers' demand to receive real-time transactional messages.

## Value / Opportunity

- Drive usage via real-time trans SMS
- Increase revenue, engagement, loyalty, LTV
- Enable full visibility of all SMS activity



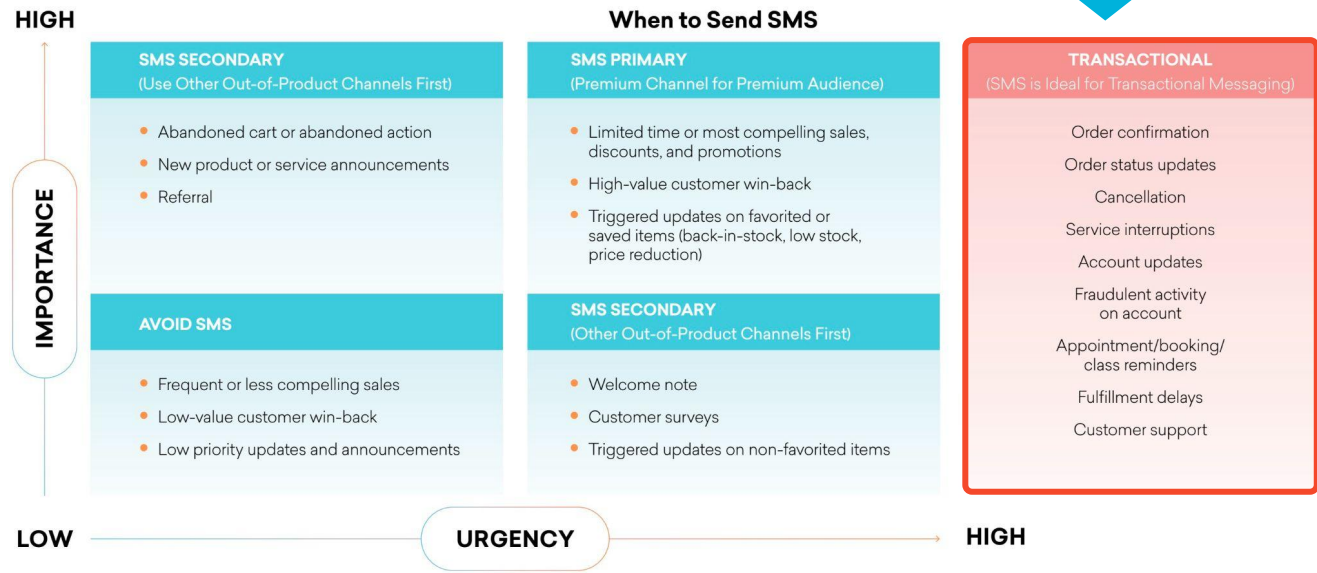
# Transactional SMS

## WHY?

- Transactional messages are TOP consumer SMS preference
- Improve extensibility to commerce platforms & external tools

#1  
**75%**  
of consumers want  
**Shipping Status SMS**

#2  
**65%**  
of consumers want  
**Order Status SMS**

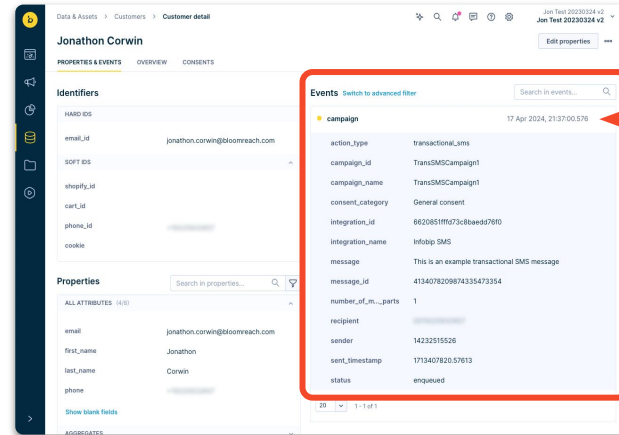
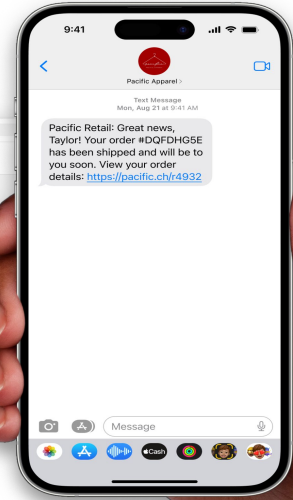
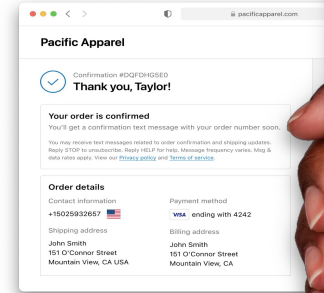





# Transactional SMS

## What Was Done?

Feature	Previous State	Current State	Benefits
Transactional SMS Dispatch	Transactional SMS was sent through various scenarios, and that did not meet all client expectations.	Introduced a specific API for immediate and direct Transactional SMS dispatch.	Immediate dispatch enhances the speed and reliability of message delivery.
Triggering Transactional Messages	Clients had to manually import events to execute Transactional SMS campaigns.  Imported events were typically used for a single purpose.	Transactional messages can now be triggered in real time from external systems.	Enhanced responsiveness and timeliness, improving user experience and satisfaction.



 **Transactional SMS campaign sent successfully!**

# WhatsApp

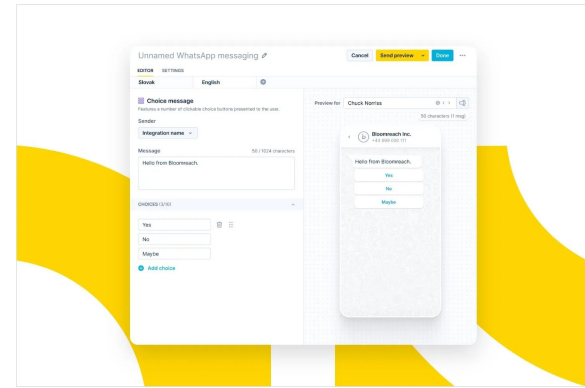




# NEW API INTEGRATION!



- We now have a **native connection to WhatsApp** API, UI is new and platform setup are new compared to the **previous method using webhooks**.



## Interactive Features

“Floating” buttons (quick replies), interactive buttons (up to 10 possible buttons/options), calling a number, CTA link etc.



## Rich media

Media messages, including high-resolution videos, images, and GIFs.



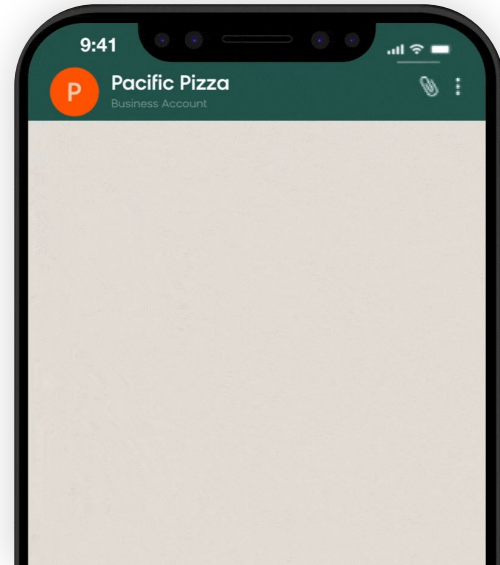
## 2-way messaging

WhatsApp-specific messages that can be triggered in real-time upon any customer event with 24-hour conversational window



## High Character count

A high character count limit of 4,096



\* **Whatsapp is a part of Meta\*** Once the application is submitted it takes about **10-15 business days** to get approved.

! For multi-brand / region clients: Within one project we can have multiple integrations for each brand or region




# Why WhatsApp?


As the [most popular global messaging app](#), WhatsApp stands out with its engaging features that allow brands to connect with customers through their everyday communications.


This approach not only feels more direct and personal but also meets customers where they are most comfortable. Many people already use WhatsApp to connect with friends and family, making them more inclined to communicate with brands on the same platform.

Time spent on **WhatsApp** in 2023

 **17 hours**  
per month  
**40% increase** from 2020

 **WhatsApp is available in 180 countries** around the world

 **100 billion messages** are exchanged on **WhatsApp**  
daily = 4.2b messages  
per hour = 1.1 million per second

 **Estimated >1 billion people** use **WhatsApp** daily



# Top Territories Using WhatsApp



## Latin America

Many countries in the Top 20 using **WhatsApp**. A cheaper alternative via WiFi, mostly replaced texting.



## Middle East

75% of nationals in seven main countries already use **WhatsApp**; it's the fastest-growing region.



## Asia

Hot spots like Indonesia & Hong Kong already have **87% of internet users using it monthly**

## Regional use examples:



**Indonesia:** 29 hours per month



**Brazil:** 28 hours per month



**Australia:** <6 hours per month US: 7 hours per month



## Areas With Increasing Adoption:



**Africa:** Kenya, South Africa, and Nigeria all have **95%+ usage**, and other countries are growing their usage



**USA:** nearly **86 million users** in 2023, largely those communicating with users in other countries.

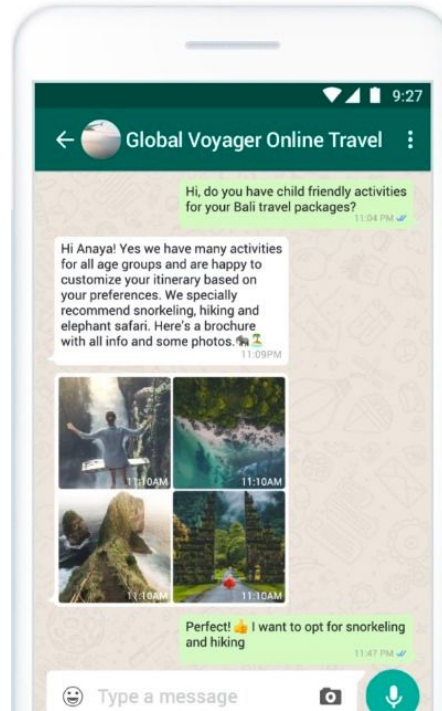


# How are messages sent via WhatsApp?

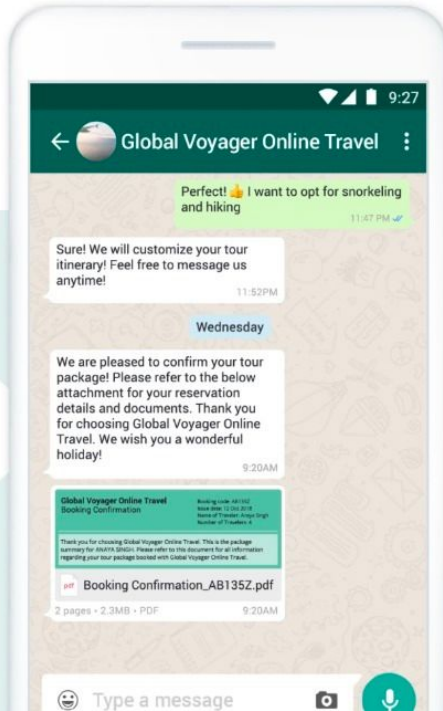
## Business-initiated messages

The brand starts a message thread by messaging user/customer

- **Requires a pre-approved template by Facebook**
- **Requires Prior Opt-In for Whatsapp specifically**



VS



## User-Initiated messages

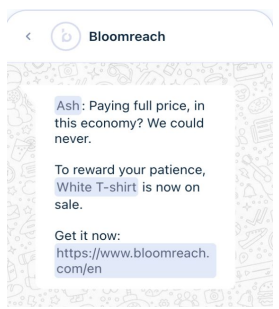
The user/customer starts a message thread by messaging the brand

- **No prior Opt-In required**
- **No template approval needed**
- **Opens a 24 hour conversational window**



# WhatsApp message types

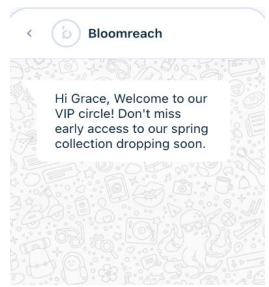
## WhatsApp Template Message



Template-based messages used to initiate marketing conversations

**Marketing messaging for opted-in customers: approval needed**

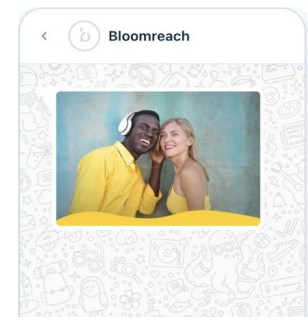
## WhatsApp Text Message



Basic text-based message for clear, universal communication

**When the customer replies to a message or initiates the conversation: no approval needed**

## WhatsApp Media Message



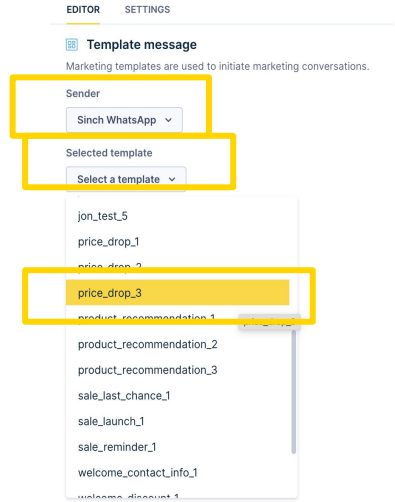
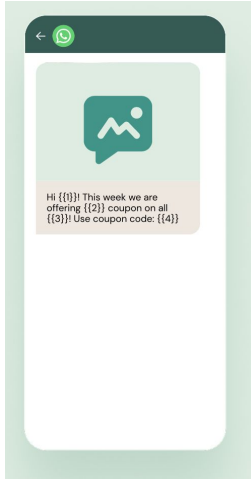
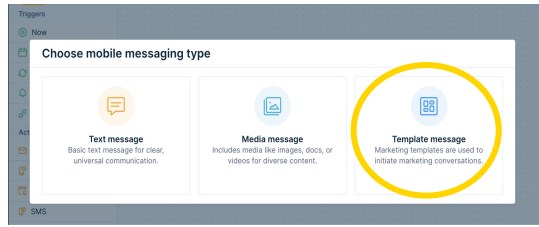
Includes media like images, videos, audio clips, and PDFs

**When the customer replies to a message or initiates the conversation: no approval needed**

# Template message



- ❖ Clients need to **submit message templates to meta for approval**. This process is currently done by asking clients to fill up this [WhatsApp - Registration Template form](#) and the mobile sme will submit them for approval. This **ensures** that the messages being sent **follow WhatsApp guidelines**.
- ❖ Message templates **contain predefined text and are pre-formatted**. Templates can be reused when there is a need to send the same message multiple times.
- ❖ They also contain **placeholders for personalisation/ dynamic content** such as the name of the customer, their order number, or more information that can be pulled.



- ★ meta usually approves between 3-5 business days , if further review, another 5 business days
- ★ once approved, these templates will automatically appear as a drop down list in the Mobile Messaging node -> editor



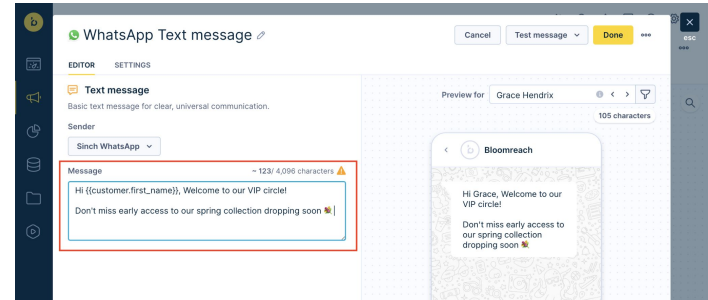
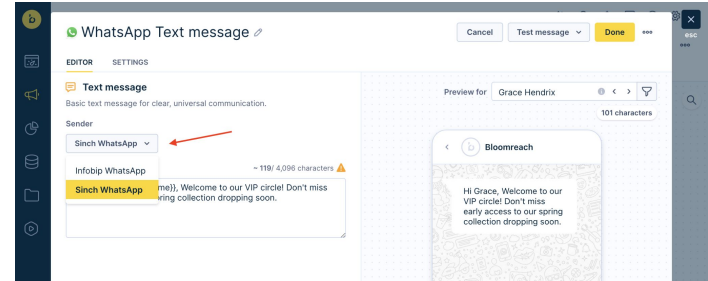
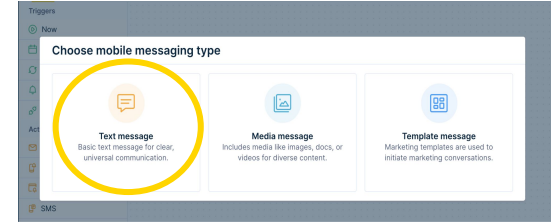
# Text/media message

**! The moment a customer replies** that opens a **24 hours conversational window** during which the **next message sent will not be charged**. Once the 24 hours pass, the window resets and then messages will get charged.

- ❖ **When the customer replies** to a message **or initiates the conversation** themselves, **you can send a free-form message in the form of text.**
- ❖ WhatsApp Text messages can contain **up to 4096 characters per message**. You can also include **Jinja personalization** and **emojis** in Text messages.

There's also no need to have the user's opt-in if you're replying to their question if this was their initiation and first communication. However, once it has been longer than 24 hours since the customer last responded, any future messages will require templates.

*If a text/media is sent but not within the 24 hour allowed period, it will get sent out but not delivered / will be blocked*

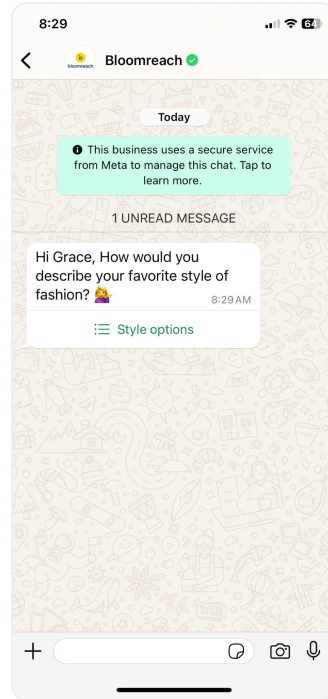
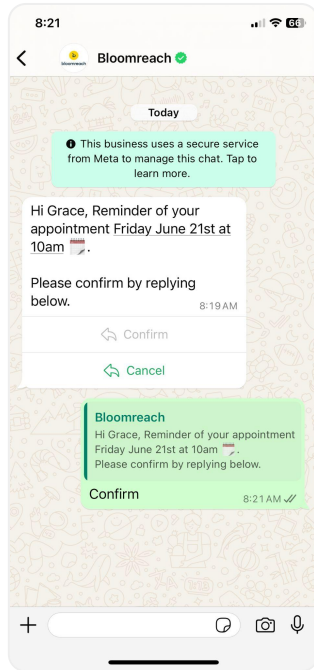




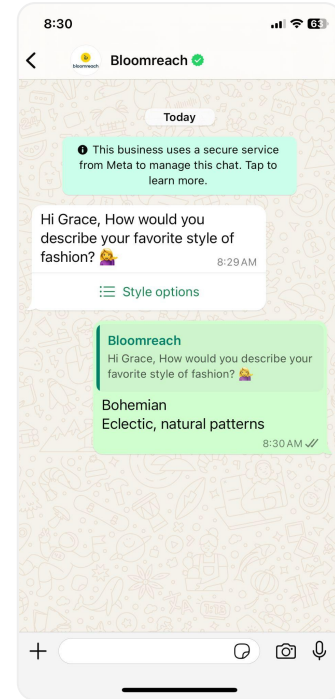
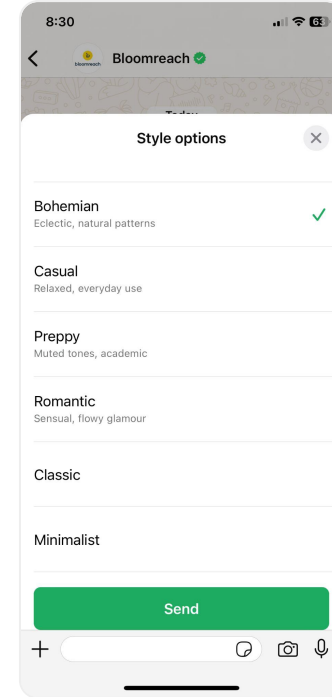
# WhatsApp - Improvements



## CHOICE message



## LIST message







Campaigns > Scenarios > 1 - WhatsApp CHOICE message - All Hands Demo (20240703)

Discard changes Save Start Demo & play Jon Corwin

# 1 - WhatsApp CHOICE message - All Hands Demo (20240703)

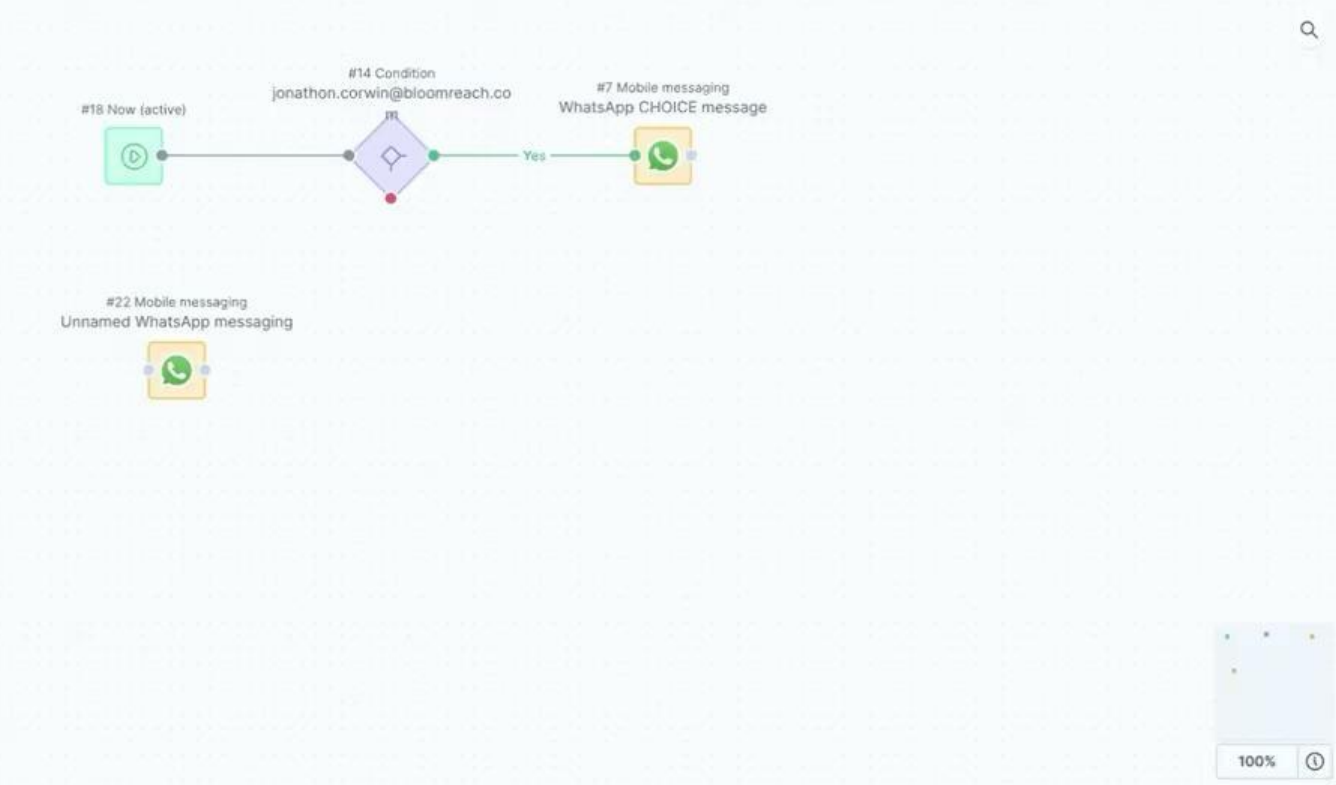
Design Test Evaluate

Triggers

- Now
- On date
- Repeat
- On event
- API trigger

Actions

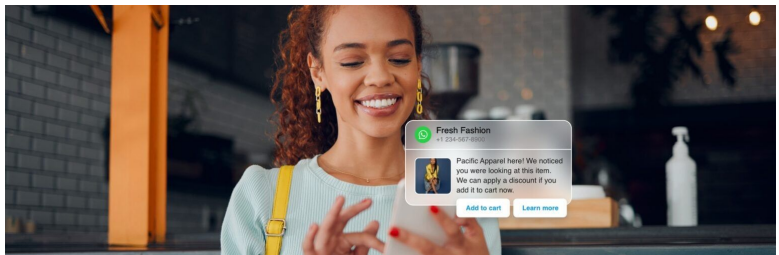
- Email
- Mobile push
- Browser push
- SMS
- Mobile messaging
- Ad Audiences
- Webhook
- App Inbox
- Other
- Operators
- Condition
- A/B test
- Contextual Personalization



100%



# WA: What do you need to get started?



1. **Open a Facebook Business Account:** A prerequisite for starting is having a Facebook Business Account.
2. **Have a long number:** Any phone number that will be used must be owned or leased by the business.
3. **Gather consent:** You can only contact customers on WhatsApp if they have explicitly provided consent.
4. **Find the right use cases and marketing templates:** Begin brainstorming what use cases you want to develop for WhatsApp. You can integrate WhatsApp in your overall omnichannel strategy.

**What if you're already invested in SMS?** → Our recommendation is to start with very clear and specific use cases for WhatsApp by considering the channel differentiations, the region's preferred channel, the targeted demographic, and making sure that you're leveraging the channel's unique features to make the most out of it.

Ultimately, you should try and reach customers on the channel that they prefer.



# WhatsApp vs. SMS

## Features



# Whatsapp vs. SMS



	WhatsApp	SMS
Character limit	4,096 per message	160 per message
Multimedia	<b>Rich media</b> (text, images, videos, audio clips, and PDFs)	<b>Plain text</b> (except MMS in the US)
Cost / two-way communication	<b>Per 24-hr conversation</b> (two-way is a given)	<b>Per message volume</b> (two-way communication is more expensive)
Setup complexity	<b>One-time setup for all countries</b>	<b>Setup and registration complexity per country</b>
Engagement & interactions	<b>Interactive buttons, viewed message receipts</b>	<b>No interaction, no read status</b>
Secure messaging	<b>End-to-end encryption</b>	<b>No end-to-end encryption</b>



# Whatsapp vs. SMS



## Benefits Summary

### Whatsapp

#### Relationship Building:

Facilitates interactive conversations, fostering relationships while giving a 24 hour window to communicate for free.

#### Media heavy content:

Supports various multimedia types for engaging content, larger messages and encouraging creativity. It also allows brand recognition (logo, verification, business details etc.)

#### Quicker setup:

Not dependent on country registrations, limitations and time constraints.

### SMS

#### Reliability:

Less dependency by reaching all mobile users, including those without internet, smartphones or downloading an app

#### Less Competition:

Simplicity means less competition for attention

#### Effective for urgent notifications:

Delivered instantly, making them effective for time-sensitive or urgent messages that require immediate attention.

# WhatsApp vs. SMS Use Cases



# SMS vs. WhatsApp: Use Cases

SMS	WhatsApp
Urgent notifications	Responding to user-initiated messages
Driving awareness of a limited-time sale	Multi-stage interactive quizzes for gathering zero-party data
Transactional messages	Strong visual content (videos, images, etc)
OTPs and authentication	Use cases with quick actions (calls, quick replies, guiding to your site or app through buttons)
Simple and direct messages	Lengthy messages containing more details



# Customer Satisfaction Surveys

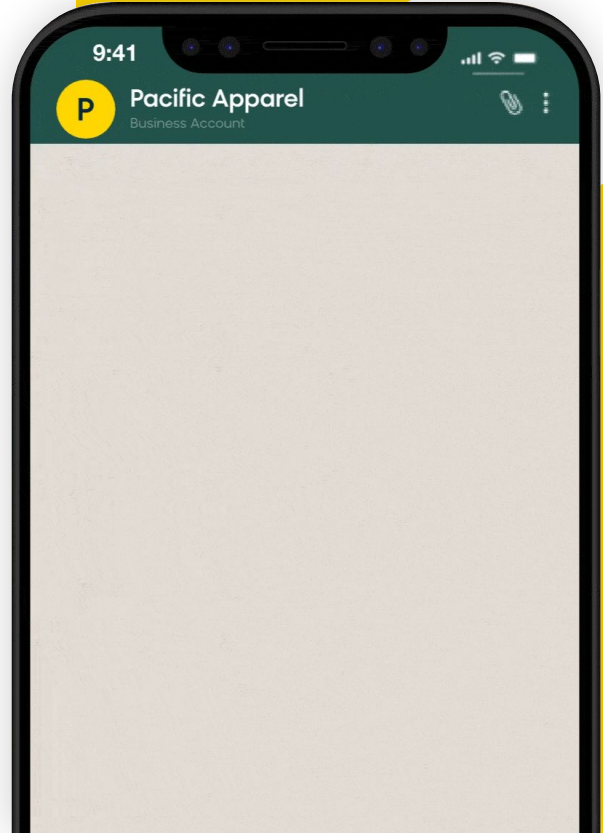
- ✓ Seamless Feedback Collection
- ✓ High Response Rates
- ✓ Immediate Actionable Insights
- ✓ Enhanced Customer Journey

**COMPLEXITY:** Medium



**RETENTION**

**Customer Loyalty**







# Cross-Selling and Upselling

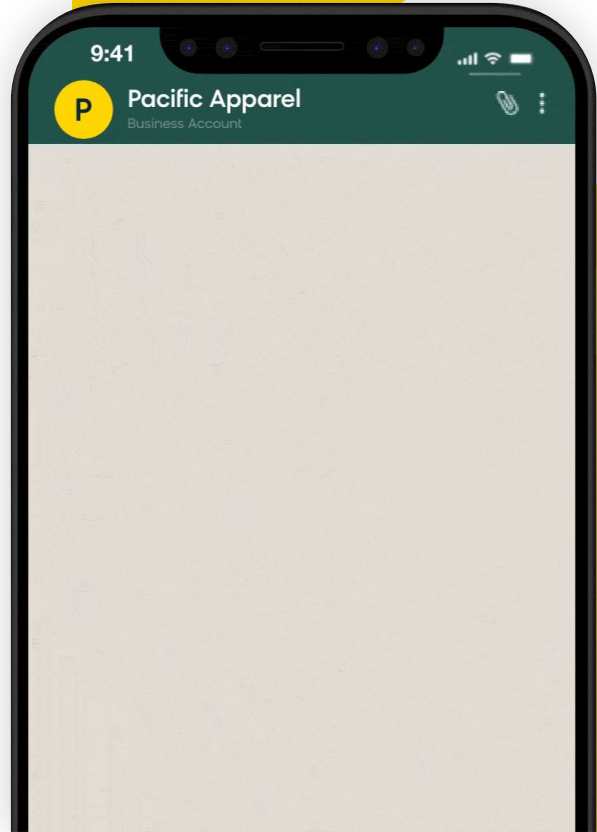
- ✓ Engaged Follow-Up
- ✓ Relevant Offers
- ✓ One-Click Convenience
- ✓ Value Enhancement

**COMPLEXITY:** Advanced



**REVENUE**

Average Order Value, Customer Experience





# Personalized Shopping Assistance

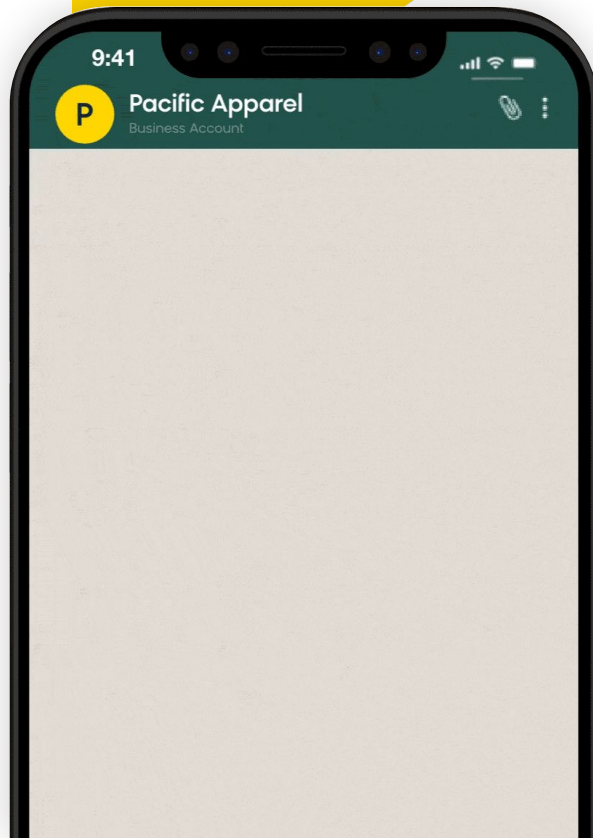
- ✓ Guided Purchasing
- ✓ Instant Tailored Recommendations
- ✓ Valuable Customer-Provided Data Collection
- ✓ Customer Relationship Building

**COMPLEXITY:** Advanced



**ENGAGEMENT**

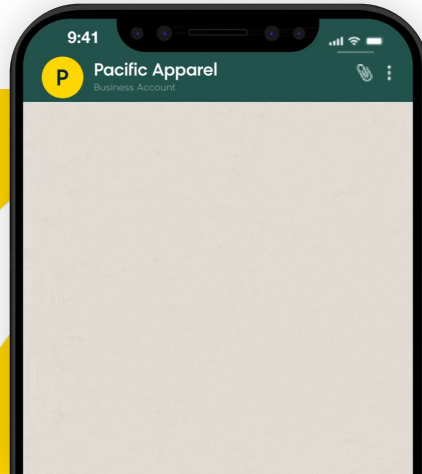
**0-party Data Collection, Conversion Rate**



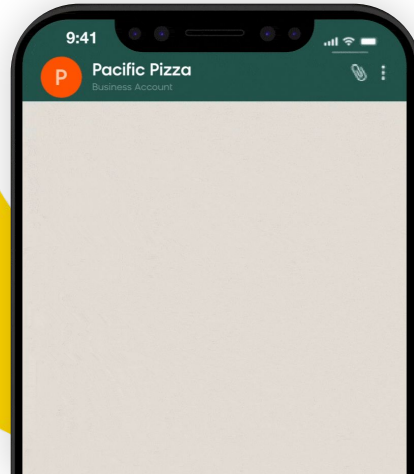


# More WhatsApp Use Cases

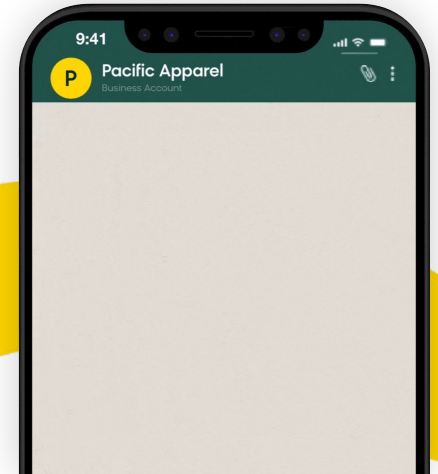
**Deals and Promotions**



**Abandoned Cart**



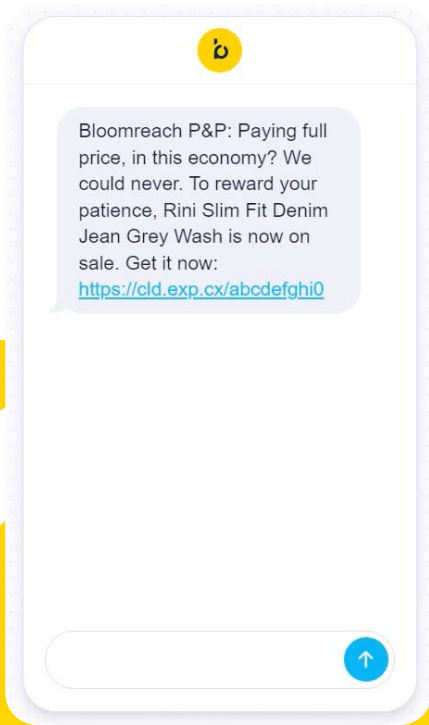
**Initial Value Campaigns**



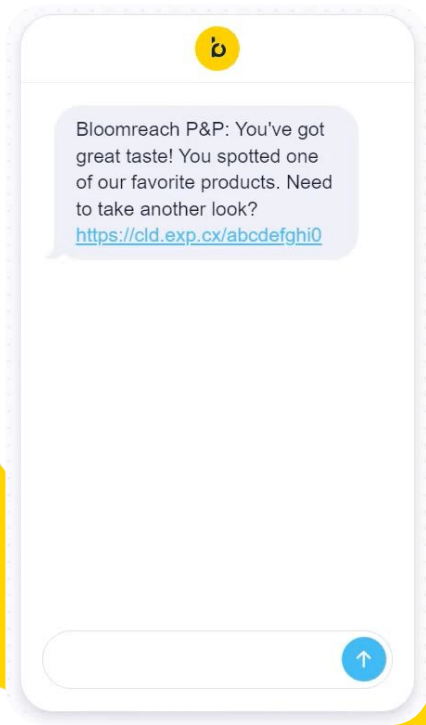


# SMS Use Cases

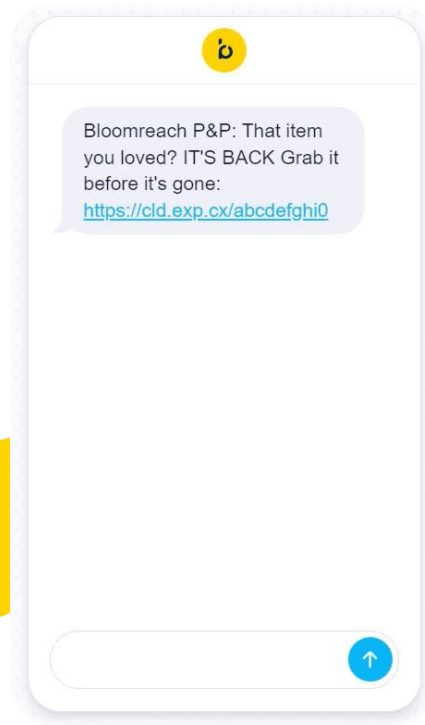
## Watchdog Price Drop



## Abandoned Browse



## Back in Stock

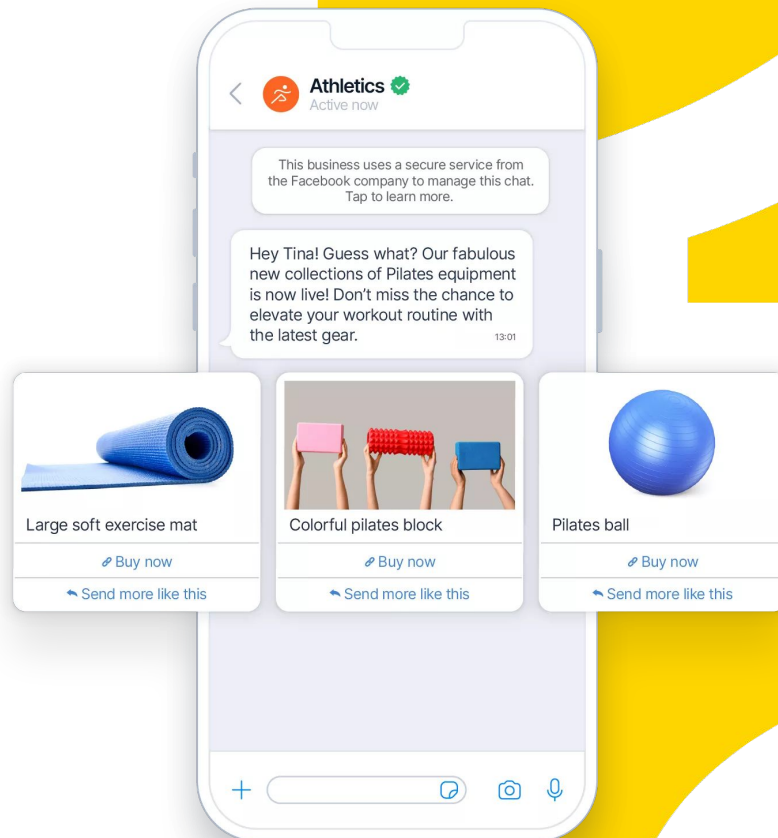


# **New & Upcoming Features for WhatsApp**

Q3 2024

# WhatsApp Carousels

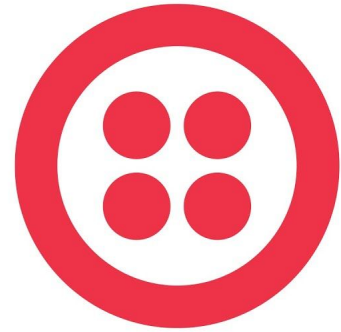
Showcase your products or services within a conversation using up to 10 customizable, scrollable cards. Each card can include images, videos, quick replies, and links, offering customers an easy and engaging way to explore your offerings.



Q4 2024

# Twilio WhatsApp

New Twilio WhatsApp integration, allows our customers to send & receive WhatsApp messages natively via Twilio's API.



Q4 2024

# WhatsApp to CS Platform Connector

We are closing the gap between marketing and customer support to offer a truly frictionless experience for customers that interact via mobile messaging channels. Our customer support platform extension via Zapier seamlessly connects to platforms like Zendesk, Freshdesk, Help Scout, and more.





# Rich Communication Services (RCS)



# Incoming: RCS!

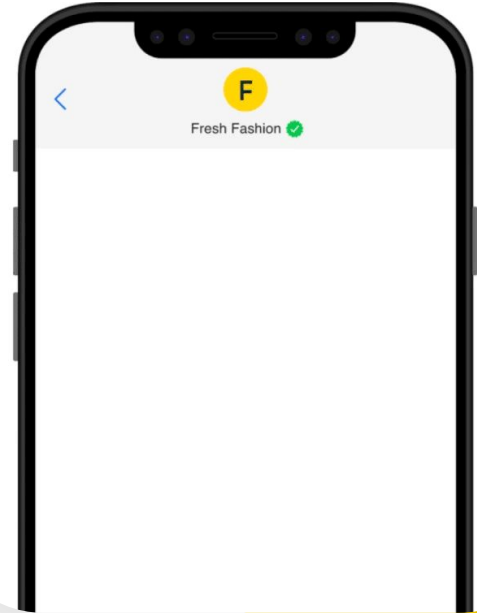




Q3 2024

## Rich Communications Service

Rich Communications Service (RCS) is a new native channel for B2C messaging that allows brands to send richer media such as carousels, verified senders, high-res video & imagery, buttons/CTAs, and more. It combines global reach of SMS with the rich features of chat to deliver interactive, conversational experiences.



**With Bloomreach you can RCS less and convert more!**



# What to expect from RCS

## Feature Capabilities of RCS:



Carousels



Cards and  
Buttons



250K  
Text Limit



High-Res Images  
and Videos



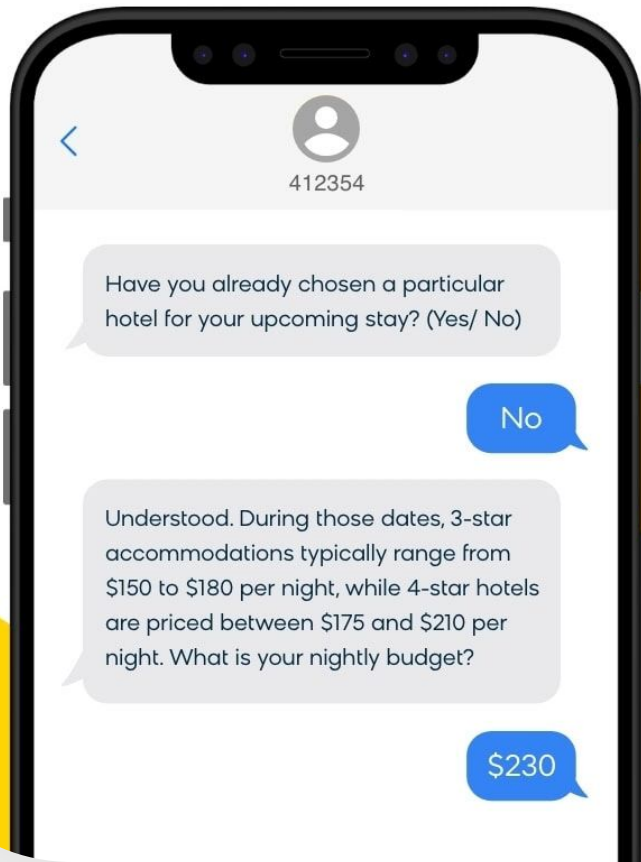
Verified  
Senders



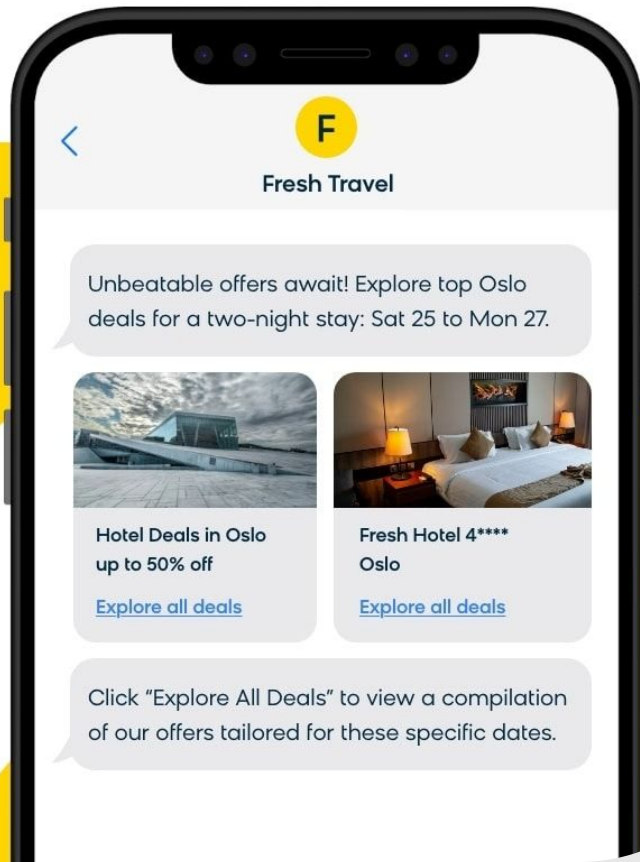
Better  
Analytics



# SMS



# RCS





# Key Takeaways

- ★ **Global Reach and Audience Preferences Matter:** Mobile Messaging channels are **personal**. Understanding **where your customers are** and their **preferred communication channels** is crucial for maximizing engagement.
- ★ **Use Case Differentiation:** WhatsApp is ideal for **interactive, visually rich campaigns**, while SMS excels in delivering **urgent notifications, transactional messages, and direct, concise** communication.
- ★ **Importance of an Omnichannel Approach:** Relying on just one channel can limit your reach and engagement. **Integrate these messaging tools into your existing journeys** to create a cohesive and personalized experience.
- ★ **Emerging Potential of RCS:** Rich Communication Services (RCS) is a growing platform that merges the **reach of SMS with the rich media capabilities of WhatsApp**.

# Q&A



**Thank you!**