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How to Choose an SMS Vendor

A 30-Point Vendor
Selection Checklist

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How to Choose an SMS Vendor

The use of email by marketers to target audiences has been in serious use for the past 8 years. Equally as long, has been the use of SMS (short message service) or “texting” as generation y so affectionately adopted that term. SMS has been in use in all parts for the world as a marketing, commerce and communication medium from everything to purchasing sodas from a vending machine to get stock tips and sports scores.

Wide spread adoption in the north America market only started to take up in the past 3 years as businesses started realized the SMS was both a simple means to reach the minds and hearts of “handy” users while providing a cost effective means to manage brand equity, marketing communications and build a loyal customer following.

With almost every type of business using SMS to grab customers or audiences, few know how to integrate SMS as part of a concerted marketing or CRM strategy to grow their business and generate ROI (Return On Investment).

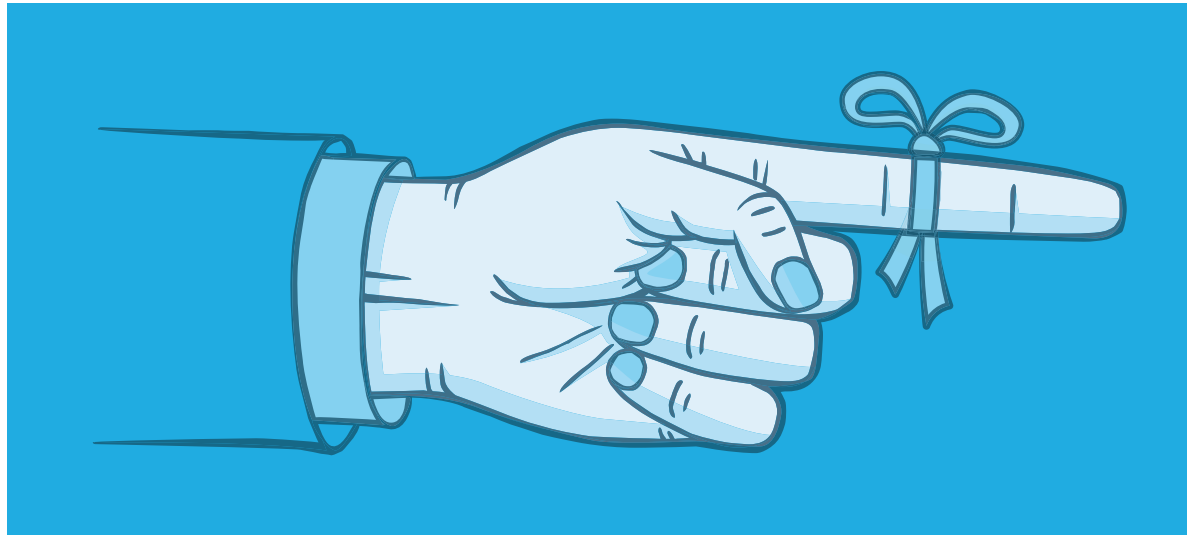
This document will touch on the key criteria for selecting an SMS vendor when looking for expertise to help your enterprise make better decisions on reaching and building an audience.

What is SMS?

Chances are you use this term if you are part of Generation X , but more commonly refer to it as “texting” if you’re Generation Y. If you’re reading this white paper you no doubt know what it is, but may be foggy on it’s limitations, but more importantly it’s potential.

All text messages are capped at 160 characters and are charged according to subscriber’s carrier pricing schedules and fees and regulations. Because of the brevity of the message and its direct reach to the intended recipient, SMS is one of the most instantaneous, direct and one-to-one marketing tools paralleled only by a phone call. 95% of text messages are read within 4 minutes (compare that to email which is 48 hours).

Because of the direct and personal nature of a text message, how you choose to build a following with it, involves expertise, forethought and planning. If used correctly with best practices in mind your organization can flourish with this channel, however if strict rules and guidelines are not followed it could have the reverse impact damaging your brand and dwindling your database.



What Should be Top of Mind?

- ✓ **Look for a Mobile Marketing Expert.** That means an organization dedicated to understanding the mobile channel. Usually, an expert will have a solid grasp on how to grow a database, all the fees associated with using the mobile channel and first hand knowledge of all carrier regulations and industry best practices. There's an ocean of rules and regulations out there . . . so your vendor has to know how to navigate your business through them.
- ✓ **Look for Technology Gurus.** There's a difference between companies offering SMS-based technologies or products and those offering SMS services. Chances are the company that's built services that understands your business atop technology platforms is closer to your mindset of how to maneuver through your market using SMS. Technology companies, per se, may not have the necessary in-house marketing expertise and understand the subtle nuances of mobile marketing.
- ✓ **Look for Best Practices.** Mobile marketing, and SMS to be more specific, can be easily deployed, yet has many moving parts. This is perhaps the pitfall that many organizations experience when implementing SMS campaigns over long periods of time with disregard to the Best Practices that makes it both effective and sustainable, like double-opting in your database and having a way to quickly be removed from any mobile program with a response of "STOP".
- ✓ **Look for a Pilot Partner.** A good SMS vendor won't just offer you 'A' for 'B', in other words exchanging money in return for a bold promise (like fast profits and "tons of sign-ups"). A sustainable, long-term relationship is built on a partnership that involves the willingness to offer a pilot that addresses your specific business needs. Proving a model that works before implementing a strategy is almost sure to deliver the results you need to bag the right solution and, therefore, the right vendor. A pilot partner should have a plan for your company to flow from the pilot right into production making this a serious ongoing communication and marketing channel.
- ✓ **Look for a Short Code Manager.** Not unlike a professional sports team manager, an SMS vendor that will help you find, acquire and manage your ongoing short code needs is crucial to winning your ongoing mobile marketing campaigns or other SMS based strategies like CRM or basic field notification services. From existing shared short codes to dedicated short codes and associated fees, a good SMS vendor will provide those services so that your ongoing and future needs are "anticipated" and enable you to move faster when putting together your SMS messaging strategies.

Selection Process

The question is always “where to start”? To make sure you’ve covered all your basis in choosing the right SMS vendor and to structure an RFP (aka Request For Proposal) to that end, we’ve provided a 30 Point SMS Vendor Selection Checklist that will leave no stone unturned as you start to test the wherewithal of those vendors trying to sell you the holy grail SMS solution.

We provide selection criteria that must be present and addressed by SMS vendors in three separate categories, mainly:

- Expert Advice
- Technology & Product Features
- Account Management & Customer Service



Expert Advice

The following criteria should be addressed to establish whether the SMS vendor could offer expert advice on your messaging strategy towards the goal of helping you make better decisions for your business:

Criteria:

1. Has Expertise in **Best Practices** (understands MMA (aka Mobile Marketing Association) and Carrier Guidelines)
2. Proficient at **Short Code provisioning and management**. A good partner can shave off months getting your code certified and working on all major carriers.
3. Understands how to **run a pilot** with strict A/B/C testing to measure ROI
4. Can help you understand how often to send your audience a message (**determining the right frequency** of your campaigns)
5. Knows how to **grow databases** through contact acquisition strategies using short codes, online and carrier querying.
6. Understands **privacy policies** and can help draft one up for you.
7. Understands **message relevance** (or knowing when and where to use SMS)
8. Understands how to **integrate email and SMS** marketing channels
9. Understands how **SMS works with Social Networks** (like knowing the difference between Twitter and SMS . . . twitter can actually be a web-based channel)
10. Understanding the SMS **behavioral patterns of your audience** (a.k.a demographic)
11. Understanding the **psychological impact of SMS** (like knowing what to message and what “not” to message)
12. Has a **good reputation with a solid list of clients** (willing to provide testimonials and case studies)

Technology and Features

Every SMS Vendor must have a solid and proven owned and operated SaaS (a.k.a Software-As-A-Service) technology platform that's managed by a team of developers. The technology platform that you'll be using to manage your daily SMS messaging campaigns should have a minimum set of features geared toward control and results.

Criteria:

1. Tools for *measuring ROI*
2. *Flexible Reporting*
3. Can provide detailed metrics on demographics
4. Smart **Bounce Back System** (that knows when to remove numbers saving your organization money)
5. Can offer **Carrier Query Services** to figure out which numbers in your database are not cell phones so they can be removed and you can save money.
6. Has *easy to use campaign management tool* that even an intern could learn how to use
7. Has **APIs to integrate with in-house systems** (e.g. an API that triggers messages based upon some sort of action a user took or your system performed) such as I get an automatic message thanking me for my purchase of a toaster on overstock.com
8. Has a system for generating **Keywords** for all forms of media (e.g. text "DEAL" to 99158)
9. Supports Shared and/or dedicated short codes
10. Offers a **platform to build your brand** (e.g. creative services or templates)
11. Can generate *autoresponders and customized messaging*
12. Offers **Security** (e.g. Database backed-up and redundancy)

Account Management and Customer Service

Technology is useless where there is an absence of support, when and where you need it. The human factor is key in the successful implementation of an SMS campaign. SMS vendors must offer both ongoing account management for professional marketers, as well as on-demand customer service when you have gotten yourself into a pinch.

Criteria:

1. Has professional services that you can choose from to help you **focus on specialty areas of your business.**
2. Provides a **dedicated resource** with an understanding of the companies technology and mobile space.
3. Offers an SLA (Service Level Agreement) with **guaranteed response times** for support issues (SMS happens in real-time. Think “American Idol” or the “Dave Ramsey Show”. . . it’s all live).
4. Has a team of professionals that can **serve as your back office, to do the heavy lifting of SOWs, project plans and help with campaign goal setting.**
5. Bases its success on your **performance goals and objectives.**
6. Answers the phone with a **positive attitude and “unexpected” eagerness to help** you succeed.

Conclusion

One rule of thumb is an old adage in the annals of legal terminology and shopping etiquette: “Caveat Emptor”, or buyer beware. To avoid the pitfalls of selecting an SMS vendor and ending up with an underperforming solution; apply process and know what you’re asking for.

Following the guidelines as outlined in this document will keep you compass pointed towards the right partner to enable your SMS strategy, be that appointment reminders for the hundreds of loyal patients or voting for millions of loyal viewers.



About mobileStorm Inc.

For nearly a decade mobileStorm has pioneered the concept of digital marketing.

Having successfully delivered more than one billion+ messages on behalf of thousands of premier customers such as Qantas Airways, MGM Grand, Palms Casino, Carl's Jr., Squaw Valley Ski Resort, and Horoscope.com, mobileStorm is at the forefront of the digital marketing revolution.

As a turnkey, hosted email and digital messaging platform backed by world-class support and expert digital marketing services, mobileStorm has created the most complete digital marketing solution available, enabling you to reach your customers via email, text (mobile) messaging, voice messaging, fax broadcast, or direct mail from a single provider.

For more information about mobileStorm's SMS marketing tools, visit www.mobilestorm.com/sms-marketing

Or to schedule a demo, contact mobileStorm today

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