heyMarket

Conversational Support

A guide to personalized customer messaging

Executive summary

Over the past few years, customers have spoken up: they want to use messaging. In-person communications have shifted out of store, but customers still want a personalized way to connect with brands that offers the convenience of the online channels they use every day. Smart businesses have listened, sprinting to adopt SMS, Facebook Messenger, WhatsApp, and other messaging channels. Now, customers can simply text a business when they have a question and quickly start a conversation. It's exciting to be a part of this sea change.

Customer messaging adoption is still surprising businesses—in a good way. Businesses are quickly learning that adopting messaging channels is a critical step in their journey to be customer-centric. They are realizing they need to plan for and manage customers' conversations professionally, not on their employees' personal phone numbers. They need to scale their messaging strategies across teams to meet customers' needs no matter what channel they're on.

In other words, they need a conversational support strategy.

We created this guide because at Heymarket, businesses have approached us with important questions about conversational support: What are its best practices? How are my peers in the industry doing it? What can I expect to improve after adopting it?

Businesses need guidance for building a conversational support strategy from the ground up. So we compiled this guide using everything we've learned from helping thousands of businesses better engage with customers through messaging. Then we talked to our partners from across the industry and included their advice for how businesses should message their customers.

This guide answers the questions businesses ask us most often, showing you:

- **What conversational support is**
- **How to create a conversational support strategy**
- **How to implement the strategy**
- **How to text customers compliantly and securely**

Along the way, we give examples from leading brands who have successfully launched a conversational support strategy, including eCommerce companies like Bobbie and retailers like Adorn Bridal, as well as guidance from messaging experts. Using this guide, you will have everything you need to create a conversational support strategy for your own business.

As we continue to shift toward new forms of communication, customers' need for one-to-one messaging conversations will only get stronger. Even as our world grows busier and multitasking becomes the norm, customers still want to make connections. That's why businesses need to adopt conversational support.

Amit Kulkarni
Co-Founder and CEO
Heymarket

Contents

How to use this guide

We believe that if you are going to take the time to read a guide, you should get both helpful ideas and concrete actions to take. So we designed this guide to not only inform you about conversational support, but also help you create a practical strategy for your own business.

Each part of the guide builds off the one before it, progressing from the strategic to the tactical. You'll use the background in Part 1 to create your strategy in Part 2, and your strategy from Part 2 to create your tactics in Part 3. You can also read the individual parts in the order you choose. For example, if you've already implemented a conversational support strategy and want to learn about staying compliant, you can go right to Part 4.

We include worksheets throughout Parts 2 and 3 that will accelerate and smooth your adoption of conversational support. To use them, simply click the link to download the editable PDF.

You can use this guide if you're new to messaging or if you've already started messaging with customers. Our guidance works across messaging channels and business texting platforms.
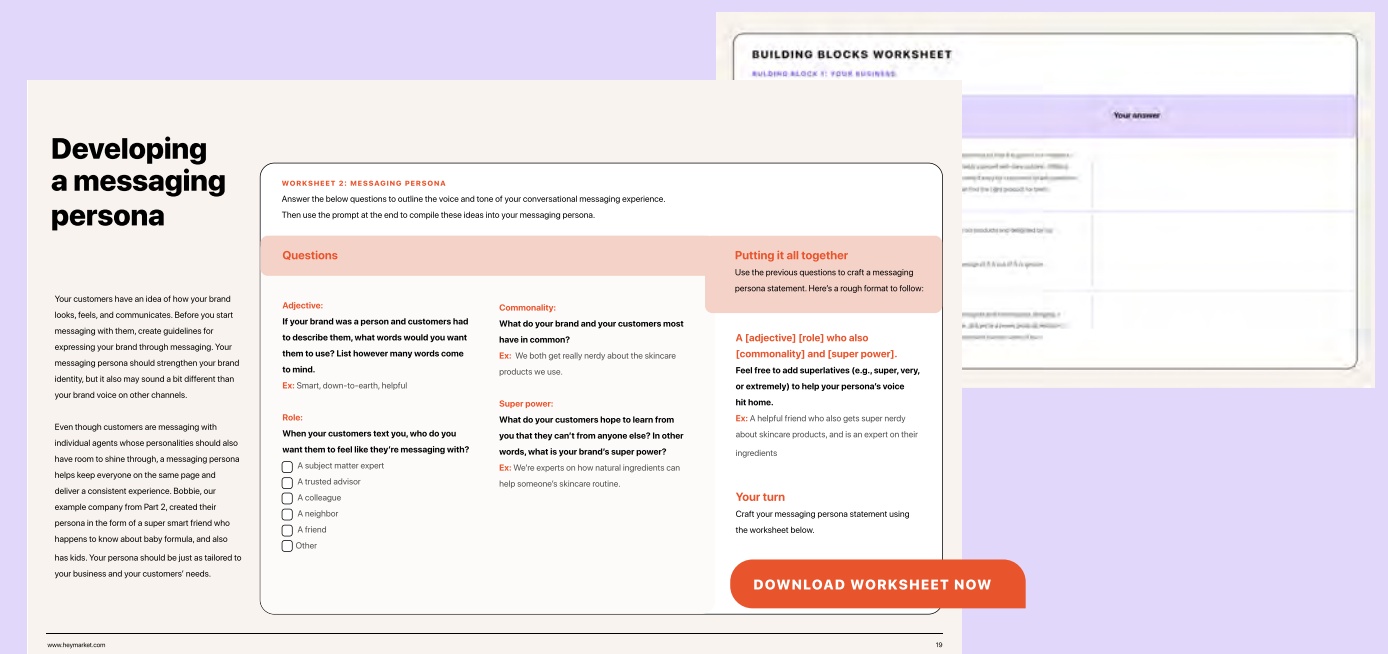
Why businesses need conversational support now

Conversational support is answering customers' questions through one-to-one conversations with real people. In recent years, conversational support's focus has shifted from phone and email to messaging on easy, immediate, and frictionless text channels. In this section, we dive into why this shift took place and what makes conversational support different from other engagement strategies.

Customers now have countless ways to get in touch with businesses, but one thing remains constant: they want to have personalized conversations when they do. And while having conversations with customers isn't new, we're finding new ways to start and manage them.

While customers are strolling into stores less and shopping online more, they still want the same authentic conversational experience they'd get in person. As online shopping expands, customer experience—the interaction a customer has with your business from start to finish—has become consumers' top consideration for return purchasing.

In other words, the quality of your customer experience now outranks that of your products or services when it comes to retaining customers.

75%
of customers will buy more from businesses with a strong customer experience.

-ZENDESK[1]

Within their experience, customers are specifically prioritizing having their questions answered quickly and having a personalized experience.[2]

In fact, 65% of customers are more likely to buy again from a retailer that remembers their name, what they bought before, and what they talked about last time they interacted.[3] This shows us that speed and personalization are the building blocks of a quality conversation.

Conversational support meets customers' need for speed and personalization where they are—on their mobile phones. At its core, conversational support is answering customers' questions through one-to-one conversations with humans, as opposed to one-way forms or automated response systems that make it difficult for customers to have quality conversations with real people.

Businesses ran to adopt the digital channels customers wanted to use during the pandemic and beyond. But without thinking through how to support customers over messaging and provide the speed and personalization they want, businesses risk letting customers fall through the cracks.

Without the right planning, here are common pitfalls your business could fall into:
- Being slow to answer a growing number of inbound questions
- Not personalizing conversations with customer history or relevant business details
- Offering an inconsistent experience across channels

By creating a conversational support strategy, you can answer customers quickly with personalized conversations that take into account their history and provide information relevant to them. It's that same great experience you have at your favorite store, but available anytime, anywhere, across all of your customers' digital channels. A strong conversational support experience will prevent customers from switching to competitors, build trust, and help sustain revenue over time.

[1]*Customer Experience Trends Report 2021 - Trend 1: Spotlight On CX,* Zendesk, 2021, https://www.zendesk.com/cx-trends-report/trend-1/.

[2]Dave Esber, "Study Finds Consumers Expect Better Customer Support In The 'New Normal'," Twilio, https://www.twilio.com/the-current/study-finds-consumers-expect-better-customer-support-in-new-normal.

[3]*The Art Of Knowing Me: The Customer Genome And The New State Of Personalization For Retail,* Accenture Interactive, 2017, https://www.accenture.com/_acnmedia/pdf-57/accenture-personalization-retail.pdf.

Why messaging?

Conversational support has shifted to a messaging-first strategy because customers increasingly prefer messaging. It's convenient, allowing them to ask questions and get quick answers on their own time from their mobile phones, tablets, and computers. It also offers person-to-person connections. Customers use it every day to connect with friends and family, and now they want to use it to connect with brands. While support queries on all channels have surged during the pandemic, messaging has become the fastest-growing channel, with 2.7 trillion business-to-consumer messages expected to be sent in 2022.[4]

Businesses thrive with conversational messaging because it provides the most direct path to supporting customers. With both customers and businesses communicating faster, response and resolution times improve. Teams grow their capacity because agents can message with multiple customers at once.

Customers report the highest engagement levels over phone and messaging apps, which offer the most personalized experiences.[5] However, phone calls are the slowest growing support channel.[6] Email offers the chance to communicate asynchronously, but email open rates hover at around 21%.[7] Webchat is conveniently placed on a company's website, but customers are reported to be dissatisfied with the channel 25% of the time.[8]

Messaging is growing faster than the above channels, with 89% of consumers wanting to text businesses.[9] Almost all messages are read (98%), and they're highly engaged with: Gartner reports a 45% average response rate.[10]

Phone calls	Email	Webchat	Messaging
• Most personal • Time-consuming • Inconvenient • High satisfaction	• Impersonal • Time-saving (asynchronous) • Low open rates	• Impersonal • Convenient • Low satisfaction	• Personalized • Convenient (asynchronous) • High engagement, satisfaction
Personalization: 5/5 **Convenience: 2/5**	**Personalization: 2/5** **Convenience: 3/5**	**Personalization: 3/5** **Convenience: 4/5**	**Personalization: 4/5** **Convenience: 5/5**

Modern messaging platforms are built to help you answer customers' questions quickly, keep them informed, and deepen personal relationships. They preserve the threads between you and your customers, so you can keep conversations personalized over time with customers' full context and history. Their various tools allow you to use messaging with the same ease that customers experience, offering back-end collaboration and efficiency tools to help you answer customers' questions efficiently. (We'll offer tips for harnessing these tools in Part 3.)

Messaging provides the clearest path to engaging with customers. It's uniquely positioned to become the dominant channel for conversational support, with more businesses adopting messaging and more platforms evolving to support their needs.

[5]Esber, "Study Finds Consumers Expect Better Customer Support."

[6]*Customer Experience Trends Report 2021 - Trend 2.*

[7]"Email Marketing Benchmarks And Statistics By Industry," Mailchimp, https://mailchimp.com/resources/email-marketing-benchmarks/.

[8]Esber, "Study Finds Consumers Expect Better Customer Support."

[9]"How Consumers Use Messaging Today," Twilio, https://www.twilio.com/learn/commerce-communications/how-consumers-use-messaging.

[10]Stanzie Cote, "The Future Of Sales Follow-Ups: Text Messages," Gartner, https://www.gartner.com/en/digital-markets/insights/the-future-of-sales-follow-ups-text-messages.

[4]*Customer Experience Trends Report 2021 - Trend 2: A More Conversational World*, Zendesk, 2021, https://www.zendesk.com/cx-trends-report/trend-2.; Dave Esber, "What Conversational Messaging Means For Business," Twilio, https://www.twilio.com/the-current/what-conversational-messaging-means-business.

Why a conversational support strategy?

"Trust is built in two layers in the messaging landscape: it's engaging consumers on the channels they prefer, and it's showing that you know them. The best, most differentiated businesses will get to a place where every time customers reach out, they'll feel like they have this personal connection with the business. That feels more like messaging with a trusted friend rather than a big business. And that's where trust has really developed."

Chris Piwinski
Senior Product Marketing Manager,
Twilio

Answering customers quickly, personally, and consistently across several messaging channels takes more than just making the channel available. To offer conversational support, you need to thoughtfully plan how your team can meet your customers' unique needs with messaging. Then you need to execute on your plan in a repeatable, scalable way that will grow as your messaging volume does.

While geared toward customer service, conversational support strategies can strengthen an entire organization. Another important reason to have a conversational support strategy, as opposed to opening new messaging channels without a plan, is to ensure that every team that touches the customer has the opportunity to use messaging effectively. Marketing, sales, and operations teams need conversational messaging to nurture leads, close deals, and keep workflows moving.

Additionally, many large businesses use personalized conversational messaging with their internal employees as well as their customers.

Comparing conversational support with other types of engagement

Conversational support is a type of customer engagement. Its goal is to answer customers' questions through two-way chats that create ongoing conversations with your brand. It's also part of a family of customer engagement strategies focused on creating conversations. On the next page you'll find how they all fit together.

Now that you know why you need a conversational support strategy, not just conversational channels, we'll cover how you actually build that strategy from the start.

Customer Engagement

The strategy of creating a connection between your business and your customers.

Audience: customers (though this can vary depending on your business)

Goal: develop a loyal relationship

Conversational marketing

Answering lead questions and sending outbound marketing messages to start conversations that convert leads.

Audience:
leads

Goal:
conversion

Direction:
inbound and outbound

Conversational sales

Giving prospects a 1-to-1 connection with the sales team so they can quickly answer questions and close sales.

Audience:
prospects

Goal:
close sales

Direction:
inbound
(with some outbound messages, like appointment reminders)

Conversational support

Answering customers' product or service questions through person-to-person conversations.

Audience:
customers

Goal:
answer inbound queries

Direction:
inbound

Conversational customer engagement

Keeping existing customers interacting with your brand using a mix of inbound and outbound messaging.

Audience:
customers

Goal:
keep existing customers connected to your brand

Direction:
inbound and outbound

How to create a conversational support strategy

Creating a conversational support strategy involves a mix of anticipating customers' needs and common questions, taking stock of your team's capacity, and knowing how your tech stack can support you along the way. In this section, we'll outline what questions you need to answer to create a conversational support strategy. Answering these questions will set you up to execute your own strategy in Part 3.

You're the expert on your own customers and the questions they typically ask. But when you open up a new messaging channel and start to offer conversational support, you're also bound to learn new things. With an easier way to get in touch, there's a good chance customers will ask more questions—ones they didn't bother to ask or feel comfortable asking on other channels. It's time to anticipate these changes and how your team will accommodate them.

Creating a conversational strategy centers around four building blocks:

01.
Business goals: understanding your company's top-line business goals and how having conversations with customers can support them

02.
Customer needs: addressing customers' current needs with your strategy

03.
Team capacity: mapping your team's capacity and collaboration to help them support customers

04.
Tech stack: taking stock of your information sources and tools so you can connect them when you launch

Businesses need to answer the following questions for each building block to plan their conversational support strategy. We've provided an explanation for why each question is important. Your goal is to be as informed as possible so it's easier to learn after you launch—not to know every answer off the bat. When you're ready to put your plan together, use the **Building blocks worksheet** we've included at the end of this chapter.

For each question, we give example answers from an imaginary eCommerce company called Clearest. We'll use examples from Clearest throughout the rest of our guide to give you a sense of how a specific company might answer each question. Our example business sells natural self-care products, currently offers email and phone support, and is adopting messaging for the first time.

Conversational support strategy: building blocks

Building block 1: business goals

Start planning your conversational support strategy by mapping out your business goals for customer conversations. Keep customers at the center of this process: offering messaging is an opportunity to make your company more customer-centric.

Next, identify the metrics for your launch, post-launch, and ongoing messaging program in advance. Having these metrics and estimates early on will help you determine how successful your launch was and keep you on track post-launch. Then, think about how to enable conversations in a way that's relevant to your business so you can keep a competitive edge.

1. Goals

Why do you want to have messaging conversations with customers? What top-level business need does this address? Your answer will become your conversational support mission statement.

Ex: We want to improve our customer experience so that it supports our mission to give people safe and sustainably sourced self-care options. Offering conversational support will make it easy for our customers to ask questions about ingredients so they can find the right products for them.

2. Outcomes

What do you want customers to think and feel after they have had a conversation with you? (Note: These outcomes can be both qualitative and quantitative. They may be different from your conversational support KPIs, which we address below and in Part 3.)

Ex: (Qualitative) We want customers to be educated about our products and delighted by our team's interactions.

Ex: (Quantitative) We want to achieve a CSAT score average of 3.5 out of 5 or greater.

3. Competition

What can you offer with your conversational support experience that your competitors can't? What advantages do your competitors have that you should look out for?

Ex. We were founded by dermatologists and toxicologists, bringing a data-driven level of expertise. But we're a newer product and don't have as much brand recognition and consumer trust as some of our competitors.

Building block 2: customer needs

Once you've identified your goals, ask the following questions about your customers' needs, behavior, and expectations. That way, you can ensure your conversational support addresses them while also working toward your business goals.

1. Needs

Why do your customers want to contact you over text and messaging channels?

Ex. Most of our customers are Millennials and Gen Z. We know they prefer using their mobile phones and having more casual conversations.

What challenges do your customers experience when using your existing support channels?

Ex. Our customers don't check their emails daily, so email support tickets tend to take a week or more to resolve.

2. Behavior

Where do customers discover your business today?

Ex. Our customers find us on Google Search, Facebook, and Instagram.

What messaging channels do your customers prefer to use?

Ex. Our customers primarily use SMS, Google's Business Messages, and Facebook Messenger.

How many customers do you expect to message you on a daily basis?

Ex. We get about 100 email support tickets daily, so we expect to eventually get at least 100 inbound texts a day.

When and how often do you expect customers to contact you?

Ex. Our customers work a variety of hours in different industries, so they want to be able to contact us at any time of day or night.

How do your customers evaluate competing vendors in your market? What parts of the experience are most important to them?

Ex. They notice if their interactions are customized to their history and preferences.

3. Expectations

When do your customers expect a response from you?

Ex. They want a response within 15 minutes.

What do they expect you to know about them?

Ex. They expect us to know their name, how often they shop from us, and the last products they purchased.

What privacy or security concerns do they have?

Ex. They want to be assured that their personal information is secured.

Building block 3: team capacity

After mapping out your customers' needs and expectations, it's time to look at how your team can support them with conversations. This means understanding your team's capacity, how they work together, how you'll train them, and how you'll track their progress.

This step is crucial: by weighing your team's capacity against what your customers need and expect, you can more easily find gaps in your strategy. Then, you can fill these with more planning (e.g., by focusing more on managing customer expectations), or by adding certain tools to your tech stack (like ones that will help automate your processes).

1. Capacity

How many team members will be messaging with customers?

Ex. We have 10 customer experience managers and one customer experience lead who will message with customers.

How long do your customers wait for a response today?

Ex. Over our current email support channel, we typically respond within 30 minutes. (With messaging, we expect to reduce this to 15 minutes or less.)

What hours can your team respond to customers?

Ex. We can respond during our business hours, 8am-6pm PST.

2. Collaboration

How does your team share information?

Ex. We use our internal chat tool to ask questions. Ideally, we'd like to be able to leave internal comments directly on text threads.

How does your team find the customer information they need to support them?

Ex. We reference HubSpot for contact information and Shopify for order history.

3. Training

Do you plan to train your team to use messaging in-house or get support from a technology partner?

Ex. We plan to do an onboarding session showing them where we store commonly used messages, and how to use HubSpot and Shopify. We'll also outline texting opt-in requirements under the TCPA.

4. Tracking

What messaging KPIs will you need to track?

Ex. We'll need to track:
- Message response time
- Resolution time
- Customer wait time
- Messaging channel volume

Who in your company needs to access or track customer conversations, and what level of access do they need?

Ex. Our customer experience managers need to be able to read and reply to every conversation. Our customer experience team lead will need to be added to select conversations, and will need to track our team members' messaging performance. Company managers and executives need to be able to see reports and track KPIs.

Building block 4: tech stack

Your communication tools are an integral part of your conversational support strategy. Evaluating your tech stack—notably your current communications channels, contact management systems, and security and compliance requirements—can help you understand the information sources you have, how to connect them, and where any gaps are.

1. Channels

What messaging channels will you use?

Ex. We will use Instagram Messaging, Facebook Messenger, Apple Messages for Business, and Google's Business Messages.

2. Phone numbers

How many and what types of phone numbers will you need for sending and receiving messages?

Ex: We have two toll-free phone numbers: one for our sales team and one for our support team.

3. Contact management systems (CRM and eCommerce platforms)

Where do you store your customer information?

Ex. We use HubSpot to store customer information and Shopify for order information.

4. Workflow automation

Does your team use any workflow automation tools?

Ex. We use HubSpot to automate our email engagement campaigns.

5. Security and compliance

What reporting or auditing requirements does your business have?

Ex: We would like to be able to export our texting threads for any future auditing.

Do you have any information security requirements?

Ex. We take data privacy seriously, and want to make sure our messages are encrypted when they're in storage.

Example | Bobbie

Launched by a team of parents, Bobbie makes organic baby formula with a mission: to provide the highest quality formula and to shift societal judgment from how parents feed their babies to the ingredients they're feeding them.

When they launched in January 2021, the Bobbie team knew texting would be an important channel for their audience of new parents, whose phones are their lifelines to the outside world. But they didn't expect just how much texting would increase their incoming question volume. Now that parents could easily reach out while they were feeding their babies, they were asking more questions, and different ones they weren't comfortable asking over email. They also weren't asking one-off questions that could be quickly resolved; they were having ongoing conversations.

Bobbie had the opportunity to really understand and build relationships with their customers. They also had the challenge of managing a high volume of inbound questions coming in at all hours. To support their customers to the level their mission required, they prioritized making each text feel personal and managing customers' expectations.

Personalization: Bobbie created a messaging persona to inject their brand voice into every text they sent: parents' super smart friend who also has kids, and just happens to know a lot about baby formula. Using this persona, they built messaging templates that created an intimate experience at scale.

Managing expectations: Parents texted Bobbie with feeding questions at all hours of the day and night. As parents themselves, the Bobbie team needed to set expectations about when they could respond. They created auto-replies tailored to different hours. One late-night auto reply explained that as parents, Bobbie team members were taking care of their own families and looked forward to helping customers during business hours. Setting this boundary has helped customers patiently wait for them to open.

"Rather than celebrating the quick solution, we've started to really celebrate the relationships that we're building over text. It's great when a text conversation diverges from order status to sending us a picture of a happy baby who's been feeding on our product."

Elizabeth Morris
Director of Customer Experience,
Bobbie

How to implement conversational support

At this point, you've written down everything you need to know about your business, customers, team, and tech stack to support them with messaging. Now that you've answered those strategic questions, you can build your tactical plan for launching conversational support. That plan includes creating your messaging persona, mapping your messaging flow, figuring out how to scale and automate your messaging, and how to measure success.

In Part 2, you mapped out *why* you're offering conversational support. You documented your goals, your customers' needs, and how your team and tech stack can get you there. It's time to shift to how you will deliver on those strategies.

When you build out your conversational support tactics, you will cover critical areas of every customer interaction:

1. **Setting and measuring KPIs**
2. **Developing a messaging persona (your brand's messaging personality)**
3. **Messaging flow**
4. **Identifying common inbound queries**
   - **Determining when agents or automation should answer questions**
   - **Building messaging templates**
5. **Managing customer expectations**
6. **Automating messaging workflows**
7. **Connecting data with your tech stack**

We'll dive into each section and explain why you need to pay attention to each tactic. We also provide a worksheet to get you ready to launch.

"Customers have different goals depending on the entry point they use to contact your business. For example, if they start from a local entry point like Google Maps as opposed to starting from a general search or webpage, it's likely they want specific real-time details to inform their decision. Businesses now have the opportunity to use this information to craft automated conversations optimized to help customers find the right answers to their questions and guide them through their customer journey."

Shruti Venugopal
Business Development Manager,
Google

Goals, outcomes, and KPIs

In Part 2, you brainstormed the business goals, outcomes, and KPIs that would help you measure your conversational support strategy's success. To start building out your strategy, revisit those goals. Ensure your KPIs support your desired outcomes, and plan out how to measure them over time.

DOWNLOAD WORKSHEET 1: KPIs NOW

Revisit the business goals, outcomes, and KPIs that you brainstormed in Part 2 of this guide. Next, you'll check if these KPIs support your overall business goals, and plan how to measure them over time.

Revisiting goals and KPIs

Record your business goals and your messaging KPIs from your **Building blocks worksheet**.

Goals (building block 1):
Ex: We want to improve our customer experience so that it supports our mission to give people safe and sustainably sourced self-care options. Offering conversational support will make it easy for our customers to ask questions about ingredients so they can find the right products for them.

Outcomes (building block 1):
Ex: (Qualitative) We want customers to be educated about our products and delighted by our team's interactions.
Ex: (Quantitative) We want to achieve a CSAT score average of 3.5 out of 5 or greater.

KPIs (building block 3):
Ex:
- Message response time
- Resolution time
- Customer wait time
- Messaging channel volume

Now answer the following questions:

Do my outcomes help achieve my goals? (If not, revisit and adjust them.)
Ex: Yes, my outcomes of delighting and educating customers and seeing an average CSAT score of 3.5 show we're reaching our goal to improve the customer experience.

Do my KPIs indicate my progress toward my outcomes? (If not, revisit and adjust your KPIs.)
Ex: Our current KPIs show how quickly we're serving customers. This contributes to the outcome of improving the customer experience, but it's not the full picture. Let's add a KPI: CSAT score. We'll include CSAT surveys in our texting threads to measure customer satisfaction.

Benchmarking

Now that you've finalized your goals, plan how to benchmark your KPIs so that you can track their progress. Answer these questions:

For each KPI, what benchmarks can you set now and how will you set the other ones?
Ex: For the KPI "message response time," we'll benchmark it based on our current email message response time.

Tracking and revisiting goals

Plan how often to measure your KPIs and check them against your outcomes. Decide:

We will measure out KPIs on a _____ basis.

We will check them against our outcomes and business goals on a _____ basis.

Revisiting goals

Finally, estimate when you'll have enough data to revisit and adjust your goals. Decide:

We will revisit and re-set our goals in _____ months.

Developing a messaging persona

Your customers have an idea of how your brand looks, feels, and communicates. Before you start messaging with them, create guidelines for expressing your brand through messaging. Your messaging persona should strengthen your brand identity, but it also may sound a bit different than your brand voice on other channels.

Even though customers are messaging with individual agents whose personalities should also have room to shine through, a messaging persona helps keep everyone on the same page and deliver a consistent experience. Bobbie, our example company from Part 2, created their persona in the form of a super smart friend who happens to know about baby formula, and also has kids. Your persona should be just as tailored to your business and your customers' needs.

WORKSHEET 2: MESSAGING PERSONA

Answer the below questions to outline the voice and tone of your conversational messaging experience.

Then use the prompt at the end to compile these ideas into your messaging persona.

Questions

Putting it all together

Use the previous questions to craft a messaging persona statement. Here's a rough format to follow:

Adjective:

If your brand was a person and customers had to describe them, what words would you want them to use? List however many words come to mind.

Ex: Smart, down-to-earth, helpful

Role:

When your customers text you, who do you want them to feel like they're messaging with?

- ☐ A subject matter expert
- ☐ A trusted advisor
- ☐ A colleague
- ☐ A neighbor
- ☐ A friend
- ☐ Other

Commonality:

What do your brand and your customers most have in common?

Ex: We both get really nerdy about the skincare products we use.

Super power:

What do your customers hope to learn from you that they can't from anyone else? In other words, what is your brand's super power?

Ex: We're experts on how natural ingredients can help someone's skincare routine.

A [adjective] [role] who also [commonality] and [super power].

Feel free to add superlatives (e.g., super, very, or extremely) to help your persona's voice hit home.

Ex: A helpful friend who also gets super nerdy about skincare products, and is an expert on their ingredients

Your turn

Craft your messaging persona statement using the worksheet below.

DOWNLOAD WORKSHEET 2: MESSAGING PERSONA NOW

Messaging flow

Now that you've established your messaging voice and tone, it's time to map out your messaging flow—what common questions can be answered with templates and which ones need more attention from your team. This process comes in three parts that all connect and build on each other:

1. **Identifying common inbound queries:** mapping out which frequent questions you expect to receive

2. **Live agent vs. automation:** deciding which questions can be answered by simple automations, and which ones need responses from real people

3. **Messaging templates:** creating messaging templates to answer your common queries

This exercise is best done in partnership with team members who know what your customers are asking about. This might include your customer service agents or salespeople. Discuss the questions below and record your answers in the corresponding column of the table on the next page. We've included a few examples to get you started.

Step 1: Common questions

List the top inbound questions you expect to receive from customers over messaging.

You can base this list on questions you receive over your existing channels or on web pages customers visit most. Keep in mind that messaging makes it easier for customers to contact you, so they may ask questions they did not ask over other channels.

Step 2: Expected volume

Review the questions you brainstormed and rank them by their expected volume per month.

You can base this rank on exact numbers drawn from existing messaging or email volume. Alternatively, you can bucket questions as "low," "medium," or "high" volume.

Step 3: Live agent vs. automation

Go back through your list of questions.

You'll decide which ones are complex enough to need live agents answering them and which ones you could answer with a simple automation, like an auto-reply.

Step 4: Messaging templates

For each question, write a messaging template using your messaging persona as a guide.

For live agent answers, keep in mind that each team member will be able to adjust the template to fit the customers' situation. For automated answers, think about which personalization fields you would like to include, such as "first name" or "order status." Use your messaging persona to ensure your templates reflect your brand.

*Tip: For this worksheet, just focus on the common questions, how you'll answer them, and the templates you'll use. You'll plan out the necessary automations for these in Part 3, **Worksheet 5**.*

Step 1: Common questions	Step 2: Expected volume (Rank by 1: high, 2: medium, 3: low, or estimate the volume. Sort the table by this column.)	Step 3: Agent vs. automation	Step 4: Messaging templates
What's my order status?	High	Automation	Happy to check on that, {{First Name}}! Your order {{order number}} has been {{order status}}. Is there anything else I can help you with while you wait for your natural self-care goodies? —{{Agent Name}}
Which of your products are vegan?	Medium	Automation	Hi {{First Name}}! Good question. All of our products are vegan and cruelty-free. Let us know if you'd like any more info about specific ingredients! —{{Agent Name}}
What product would you recommend as a gift to...	Low	Live agent	Hi {{First Name}}, I can definitely recommend some products! First, do you have an idea of what their favorite skincare products are now?

**DOWNLOAD WORKSHEET 3:
MESSAGING FLOW NOW**

What's my order status?

Happy to check on that, **Alex**! Your order **55678** has been **shipped**. Is there anything else I can help you with while you wait for your natural self-care goodies?
—Daina

What product would you recommend as a gift to...

Hi **Stephanie**, I can definitely recommend some products! First, do you have an idea of what their favorite skincare products are now?

eCommerce and retail: updating customers

Retail and eCommerce companies should spend additional time planning how to send customers order updates and how to help them connect with your team quickly. To do this, integrate your eCommerce platform with your business texting platform.

A Shopify SMS integration syncs your Shopify orders and customer information with your messaging, so you can send customers automatic order updates every time their order statuses change. If a customer has questions, they can reply to the automatic update and start a conversation with a live agent in the same thread.

Once you've set up your eCommerce integration, use the bonus worksheet to map out your order update flow.

ECOMMERCE WORKSHEET: ORDER UPDATES

Use the table below to map out each stage of a customer's order. Then craft message templates to keep them updated as their order progresses. Consult your messaging persona to ensure each message is in your conversational brand voice.

After you've written your messaging templates, use an eCommerce texting integration to set them up as automatic order updates triggered by order statuses changing.

Order stage	Example	Your message template
Order Confirmed	Hi {{First Name}}, we've received your Clearest order! Thanks for trusting us with your natural self-care needs. Text STOP to unsubscribe.	
Order Shipped	Your Clearest order is on its way to your door! Track it here: {{URL}}. Text STOP to unsubscribe.	
Order Canceled	Your Clearest order has been canceled. You should receive a refund within 5-7 business days. If you have any questions, reach out to our team. We're ready to help! Text STOP to unsubscribe.	

DOWNLOAD ECOMMERCE WORKSHEET: ORDER UPDATES NOW

Managing customer expectations

In Part 2, you mapped out how often your customers contact you, when they expect a response from your team, and your team's capacity to respond. It's time to revisit those questions and plan how you'll manage customer expectations.

Start by looking at your answers in your **Building blocks worksheet** about your customers' expectations and your team's capacity. Record them here.

Question	Example	Your answer
When do your customers expect a response from you? (building block 2)	They want a response within the next two business hours.	
How long do your customers wait for a response today? (building block 3)	Over our current email support channels, we typically respond within 30 minutes. (With messaging, we expect to reduce this to 15 minutes or less.)	
What hours can your team respond to customers? (building block 3)	We can respond during our business hours, 8am-6pm PST.	

**DOWNLOAD WORKSHEET 4:
MANAGING EXPECTATIONS NOW**

Managing expectations: auto replies

Next, you'll create auto replies to manage customer expectations when they contact you at specific times of the day or night.

Here are the primary types of auto replies:

- **During hours (normal):** your default answer about what response time to expect

- **During hours (peak):** expected response time during a busy time (e.g., the lunch rush or the winter holidays)

- **After hours (normal):** your default answer about response times after your business hours

- **Overnight (urgent):** your late-night response for customers texting in with urgent questions

Use the answers on the previous page to create four auto replies. Feel free to make more for other times of day, bussiness hours changes, or holidays.

Auto reply type	Example auto reply	Your auto reply
During hours (normal)	Thanks for reaching out, {{First Name}}! One of our team members will be with you in the next 15 minutes.	
During hours (peak)	Thanks for reaching out, {{First Name}}! We're helping a lot of natural self-care enthusiasts right now. You'll hear from one of us in the next 20 minutes.	
After hours (normal)	Thanks for getting in touch! Our team is away for the night, taking some time for self-care. We'll come back refreshed and ready to assist you during our business hours, 8am-6pm PST.	
Overnight (urgent)	Thanks for messaging us, {{First Name}}. We know our customers need help at all hours, but our team is recharging at home for the evening. We'll be back and ready to respond during our business hours, 8am-6pm PST. Your message will be a top priority when we return.	

Automating messaging workflows

You've already identified ways to automatically respond to customers. Now it's time to map out where you'll use these auto-replies and where you can use other automations that can streamline your messaging and free up your team's time.

What is a messaging automation?

A messaging automation is an action your business texting platform can take to simplify a routine task related to messaging: sending a text, adding a customer to a list, or assigning the message to another team member, for example. It puts texting tasks in motion, so like a slingshot, it needs different forces to start and execute that task.

For an automation to work, it has to have three main components: the type, the trigger, and the action. The type of automation is where the automation will live within your customer messaging strategy. The trigger puts the automation in motion, and the action is what takes place when that automation gets triggered.

What to automate

In general, you should use automations for messaging tasks your team repeats with minimal change and complexity. Start with basic automations, like creating auto replies for during and after your business hours, or auto replies to answer frequently asked questions. Revisit this worksheet after you have launched to create more complex workflows.

Automation types

Texting automations typically fall into the following types:

Auto reply: sending a first response to a customer's message

Frequently asked question: sending an answer based on the incoming message's content

Feedback request: asking customers to rate their experience with your products or services

Routing: assigning a conversation to a specific agent, adding the conversation to a list, or closing it

Follow up: programming automatic follow ups with customers after certain actions take place

Trigger types

Each automation has a trigger—the criteria that tells the automation to take an action (e.g., sending a message). The trigger types available to you depend on your business texting platform, but typically include:

First incoming message: the first time a customer texts your business number

Message keywords: specific words in the message

Time: what time the message comes in

Incoming call: when a customer calls in (if your texting platform permits)

Messaging channel: what channel (SMS, Facebook Messenger, etc.) a message comes through

Close chat: when an agent closes a conversation

Message intent: the reason a customer sent the message (available with platforms that use AI to determine message intent)

Action types

Business texting platforms also allow you to choose from a range of actions. An action is a task that your platform carries out when it identifies the trigger you've selected. Depending on your tools, your available actions can be:

Send a message: sending a templated text message, the most common automation

Send a survey: sending a feedback or CSAT survey within the existing texting conversation

Add to a list/remove from list: adding or removing the customer to/from a list of contacts

Assign to: assigning the conversation to a specific agent

Close chat: closing the messaging conversation

Automating messaging workflows

Putting it all together

Use the table on the right to identify types of automations based on your needs, map out what triggers them, and note the actions they carry out.

Note: Feel free to start small at this step and just focus on those automated replies. You can return to this step with more advanced automations after you've launched.

DOWNLOAD WORKSHEET 5: AUTOMATING MESSAGING WORKFLOWS NOW

Start with your automation ideas from **Worksheet 3: messaging flow**, and your auto replies from **Worksheet 4: managing expectations**.

Create those basic automations using the table below. Later, once you've launched, you can return to this worksheet and create more complex automations.

Type	Automation Name	Trigger	Action	Template (if applicable)
Frequently asked question (from **Worksheet 3**)	Order status	Message keywords: "order status"	Send a message	Happy to check on that, {{First Name}}! Your order {{order number}} has been {{order status}}. Is there anything else I can help you with while you wait for your natural self-care goodies? —{{Agent Name}}
Auto reply (From **Worksheet 4**)	During-hours auto reply (normal)	Time of day: 8am-6pm PST	Send a message	Thanks for reaching out, {{First Name}}! One of our team members will be with you in the next 30 minutes.
Follow up	Message close survey	Close chat	Send a survey	Thanks for chatting with us, {{First Name}}! Did you enjoy your experience with Clearest? Answer from 1 (not enjoyable) – 5 (enjoyable).

Connecting data

When your team messages with customers, they need to have accurate data on hand so they can deliver a tailored, seamless experience. With messaging integrations, your business can sync different data sources to your business texting platform so key fields are displayed while you text. That way, your team doesn't have to constantly switch between platforms.

In Part 2, you answered questions about your tech stack. Now, it's time to map out where your different information sources come together and how the people who need to access your data will get it.

WORKSHEET 6: CONNECTING DATA

Answer the questions in each column of the table below to log what data your team needs to access, and how you will connect your tech stack to your messaging platform. Column 3 will become the list of which integrations you need for your conversational support strategy. Column 4 is the custom field you will use to merge that piece of data into a message template, such as "Hi {{First Name}}."

What data does your team need to reference while helping customers?	Where do you store each piece of data? (If this data lives in multiple places, list the original source of truth.)	What integration do you need to bring this data into your business texting platform?	Custom field name
Customer name	HubSpot	HubSpot SMS integration	{{First Name}}, {{Last Name}}
Order number	Shopify	Shopify SMS integration	{{Last Order ID}}
Total number of orders	Shopify	Shopify SMS integration	{{Orders Count}}
Loyalty program	HubSpot	HubSpot SMS integration	{{Loyalty Program}}

Personalization

Personalization is a crucial conversational support tactic that you should embed throughout this process. At every step of building out your strategy, you should be asking how you can further tailor your experience to each customers' needs, giving them a special and delightful experience.

Build personalization into your messaging flow by:

- Adding custom fields to your messaging templates
- Managing customer expectations in a way that shows you know them
- Connecting the systems that store your customer data so you can easily reference their individual situations when you text them

But these are just the foundation for making your messaging experience truly personal. Here's a look at how Adorn Bridal personalized their experience to understand their customers' needs and empower them throughout the entire process.

Example | Adorn Bridal

Adorn Bridal specializes in creating a bespoke experience for brides while helping them find the right dress for their special days. Traditionally, they did this with in-person consultations. This approach had to shift to reduce brides' time spent in the store during the COVID-19 pandemic surge, and then to meet peak demand in one of the busiest years for the bridal industry.

The Adorn team recreated personalized consultations over mobile, combining an initial kickoff call with texting threads about styles the brides liked, photos of their favorite dresses, and budget questions. Stylists could reference that messaging history at any time, instead of trying to remember what one bride said on a phone call. When the time came for an in-person appointment, they already had a personal rapport. This helped them cut bridal visit time down by 50%—keeping things safe while freeing up their team's time.

Having more time to develop that personal connection with brides means that Adorn's stylists are more attuned to what brides need by the time they arrive for their in-person appointments. This is especially important for that critical moment when they're deciding on their dresses.

"One of the successes for our business that started before the pandemic, but really took off as we were trying to make things safe with our brides, was texting and doing a lot of pre-confirmation. Being personal is really important. We're trying to create bonds."

Jennifer Williams
Store Director,
Adorn Bridal Nashville

Messaging compliance and security

Before you launch your conversational support strategy, it's time to think about how to message in compliance with security and privacy standards. This section provides a primer on basic compliance and security considerations for you and your teams as you adopt messaging. Keeping compliance and security in mind will help you send content that customers truly want to receive and reduce the chances that carriers filter out your messages.

One reason that so many businesses are adopting messaging is that consumers trust the channel. Less than 3% of text messages are spam, while 28% of emails are.[1] Much of that is thanks to the Telephone Consumer Protection Act (TCPA), which requires all businesses who text to ensure they are only texting customers who have opted in. Businesses that are serious about data privacy are also embracing Service Organization Control 2 (SOC 2) compliance. Here's an overview of TCPA and SOC 2 compliance.

Telephone Consumer Protection Act (TCPA)

The Telephone Consumer Protection Act (TCPA) is a 1991 law originally meant to limit spam telemarketing calls. Now, it also protects consumers from receiving unwanted text messages. All businesses who use SMS to contact their customers need to follow the TCPA to stay compliant.

At its core, TCPA compliance requires three important things:
- Clearly outline your SMS services
- Only text customers who have opted into your SMS services
- Make it easy for customers to opt out

Outlining your SMS services

When you ask customers to opt into your texting services, clearly define what they are agreeing to. On your website and other entry points where you publish your texting numbers, state what kind of content you'll be sending (e.g., customer support or account alerts).
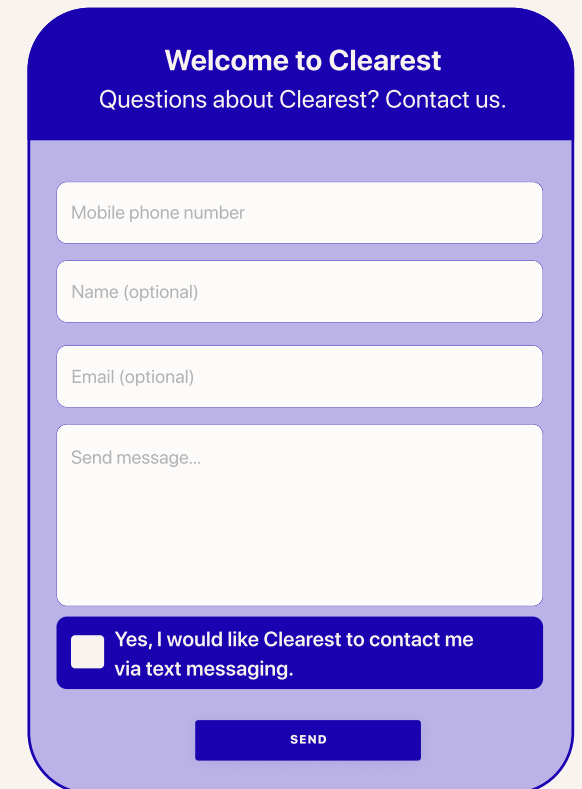
Getting customer opt in

You need customers' permission to text them. Only text them for the specific purposes or campaigns they have opted into. For example, if a customer contacts you with a support question, that does not count as an opt-in for your marketing messages.[2]

To opt in, customers can:
- Text your number
- Text an opt-in keyword
- Fill in a web form
- Click a button on a website
- Sign up in person using your point of sale (POS) device
- Opt in during a phone call with interactive voice response (IVR) technology

Keep a record of customer opt ins. That way, you can demonstrate how and when customers gave you permission to text them.

Different types of texting require different opt-in approaches. Next, we'll explore a brief overview of opt in guildelines for conversational texting, informational texting, and promotional texting.

Welcome to Clearest
Questions about Clearest? Contact us.

Mobile phone number

Name (optional)

Email (optional)

Send message...

☐ Yes, I would like Clearest to contact me via text messaging.

SEND

Compliance with legal frameworks, such as the TCPA, may be fact- and context-specific. The information contained in this guide should not be relied upon as legal advice or to determine how the TCPA or other laws or standards apply to your use of SMS and our service. This information is provided "as is" and may be updated or changed without notice. You may use this guide for your internal reference purposes only.

[1] "CTIA Updates Messaging Principles and Best Practices to Further Protect Messaging From Spam," CTIA, 2019, https://www.ctia.org/news/ctia-updates-messaging-principles-and-best-practices-to-further-protect-messaging-from-spam.; "Global Spam Volume As Percentage of Total E-Mail Traffic From 2007 To 2019," Statista, 2021, https://www.statista.com/statistics/420400/spam-email-traffic-share-annual/.

[2] *Guide To U.S. Messaging Compliance,* Twilio, 2019, https://ahoy.twilio.com/sms-compliance-guide.

Conversational opt in

If a customer texts your business first with a question, your team can answer that question. When a customer initiates the conversation, they imply that you may text them about that specific request. But in order to text the customer for any other purpose, you have to ask them to specifically opt in to those types of messages.[3]

Informational opt in

Informational texts include appointment reminders, welcome messages, and alerts. In order to send these types of messages to customers, you have to receive their permission first. They can give permission via text, on a form, on a website, verbally, or in writing.[4]

Promotional opt in

To send promotional messages to customers, you need their written consent (e.g., a signed form or a checked box online). You should also send a confirmation message reiterating what campaign they are enrolled in, how often they'll receive messages, any messaging fees that may apply, and how to opt out.[5]

Double opt in

In some cases, like when customers sign up for texts from somewhere other than their phones, businesses should use a double opt in. A double opt in asks customers to confirm they want to receive texts. Your legal team can help you decide which level of opt in is best for your business.

Here's an example of a double opt-in message:

> Hi! You've opted in to Clearest's SMS services. Please reply with CONFIRM to confirm. Text STOP to unsubscribe.

Easy opt outs

Customers always need the option to opt out of your texting program. They must be able to text a standard keyword, like STOP, END, CANCEL, or UNSUBSCRIBE to immediately stop receiving texts from your business number. Your messaging platform should be able to automatically opt out those customers or add them to an opt-out list. Include opt-out instructions on each initial text you send customers in a conversation.

Here's an example of giving opt-out instructions:

> Hi, this is Katie from Clearest following up on your order {{Order Number}}. What'd you think of our products? Reply with a number 1-5, 5 being great, 1 being not so great. Text END to stop receiving texts.

The bottom line

Most importantly, your team absolutely cannot text customers without securing opt ins.

Having the right messaging product in place can help ensure that TCPA compliance does not become onerous for your business. The next page offers a closer look at a few TCPA compliance considerations. Please note that these are general approaches, and it's critical to consult your legal counsel about matters of compliance.

[3-5] Messaging Principles and Best Practices, CTIA 2019, https://api.ctia.org/wp-content/uploads/2019/07/190719-ctia-messaging-principles-and-best-practices-final.pdf.

The Telephone Consumer Protection Act (TCPA) mandates that your team must secure consent from customers before sending them texts and that your team must honor opt outs. It also requires that your business be completely transparent when advertising your texting services. The below information can help you understand the core of TCPA messaging compliance.

Give an accurate description of your SMS service
Customers need to know what they're signing up for before they opt in to receiving messages from you. Wherever you promote your SMS number, clearly state the content you intend to text customers.

Ensure customers opt in before texting them
Before you contact any customers via text, make sure they opt in by giving their consent. Keep a record of opt ins, or use a text messaging service that does this for you automatically. In some cases, double opt ins can help you ensure compliance.

Allow customers to opt out any time with keywords
Customers must be able to text in a keyword (e.g., STOP, UNSUBSCRIBE) whenever they want to stop receiving texts. Let customers know how to opt out in the first message you send, and periodically after that. Your business messaging platform should automatically opt out customers who text in with those keywords or add them to an opt-out list.

Regularly check for reissued numbers
Your business is responsible for removing contacts who opt out and not texting people who haven't opted in. But sometimes, phone numbers are reissued without any notification. To prevent your team from texting a reissued number, delete phone numbers that haven't been active in a certain amount of time.

Best practice:

Choose a messaging platform that allows you to set up an automation that triggers when a customer messages in for the first time. The response to their first message should let the customer know that they can opt out at any time by responding with STOP or any of the related keywords.

Service Organization Control 2 (SOC 2)

Service Organization Control 2 (SOC 2) is a set of data privacy standards released by the American Institute of Certified Public Accountants (AICPA). While SOC 2 compliance is not required by law like the TCPA is, more businesses are choosing to undergo certification. A SOC 2 report shows that your customer data processes are well-documented and secure, and can help customers decide whether to use your services and products.

To achieve official compliance, you must have a third-party provider review and evaluate your data management—including your text messaging processes. This information sheet gives an overview of what SOC 2 compliance entails:

INFO SHEET | SOC 2 COMPLIANCE CONSIDERATIONS

SOC 2 reports review the effectiveness of your business's data security. Achieving SMS compliance with SOC 2 involves a third-party audit. Here's an overview of the aspects of your business that a SOC 2 report covers, including:

Security

Your systems and stored data must be secured against unauthorized access or disclosure.

Availability

Your information and systems must be readily available for use.

Confidentiality

Your business's confidential information must be protected.

Processing integrity

Your data processing workflow must be complete, valid, accurate, timely, and authorized. Customer data must be accurate throughout the process.

Privacy

Personal information must be collected, used, retained, disclosed, and disposed of as pre-stated policies request.

SOC 2 Type 1 and Type 2
A business may choose to have a SOC 2 Type 1 or a SOC 2 Type 2 report.

A Type 1 report gives a snapshot of a company's performance for a specific point in time, describing security controls but not judging their effectiveness.

Type 2 reports describe and evaluate a company's long-term performance, usually over a period of 3-12 months.

Conclusion: what's next?

Customers need conversational support due to their new preference for messaging and their need to make fast, personal connections while they shop. And now you know what it takes to plan and build a conversational support strategy to meet them where they are.

As you continue on your way to personalized conversational messaging, keep these key takeaways in mind. They will make the process of launching and scaling your strategy clearer and easier:

Start small

Find a manageable place to start for your business, whether it's beginning with one messaging channel or creating auto replies before you tackle more complex automations. Focus on promoting your messaging through your chosen channels clearly and making it simple for customers to contact you.

Test

When you open a messaging channel, monitor message volume and what customers are asking about. Document your learnings. Then test ways to answer those questions more scalably, whether that's internal enablement or a messaging automation. See how these tests affect response rates and resolution times, and depending on what you learn, implement more.

Personalize

Do whatever you can to make each conversation fit the customer. Build messaging templates that include custom fields, and insert their names and loyalty statuses. Connect your CRM or eCommerce platform so your team can reference customer history. Create an easily accessible story about each customer so you can build relationships.

Launching a strong conversational support strategy will set you up for the next innovation that will change how businesses communicate with customers: leveraging machine learning to understand what topics drive successful messaging conversations.

hey Market

About Heymarket

Heymarket is a conversational messaging platform that empowers businesses to build personalized relationships with their customers at scale. Leading brands—including U-Haul and Methodology—use Heymarket's powerful shared inboxes to reach customers across SMS and popular messaging channels. Get in touch to learn about how Heymarket's intuitive and secure platform can help you drive sales and grow customer loyalty.

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