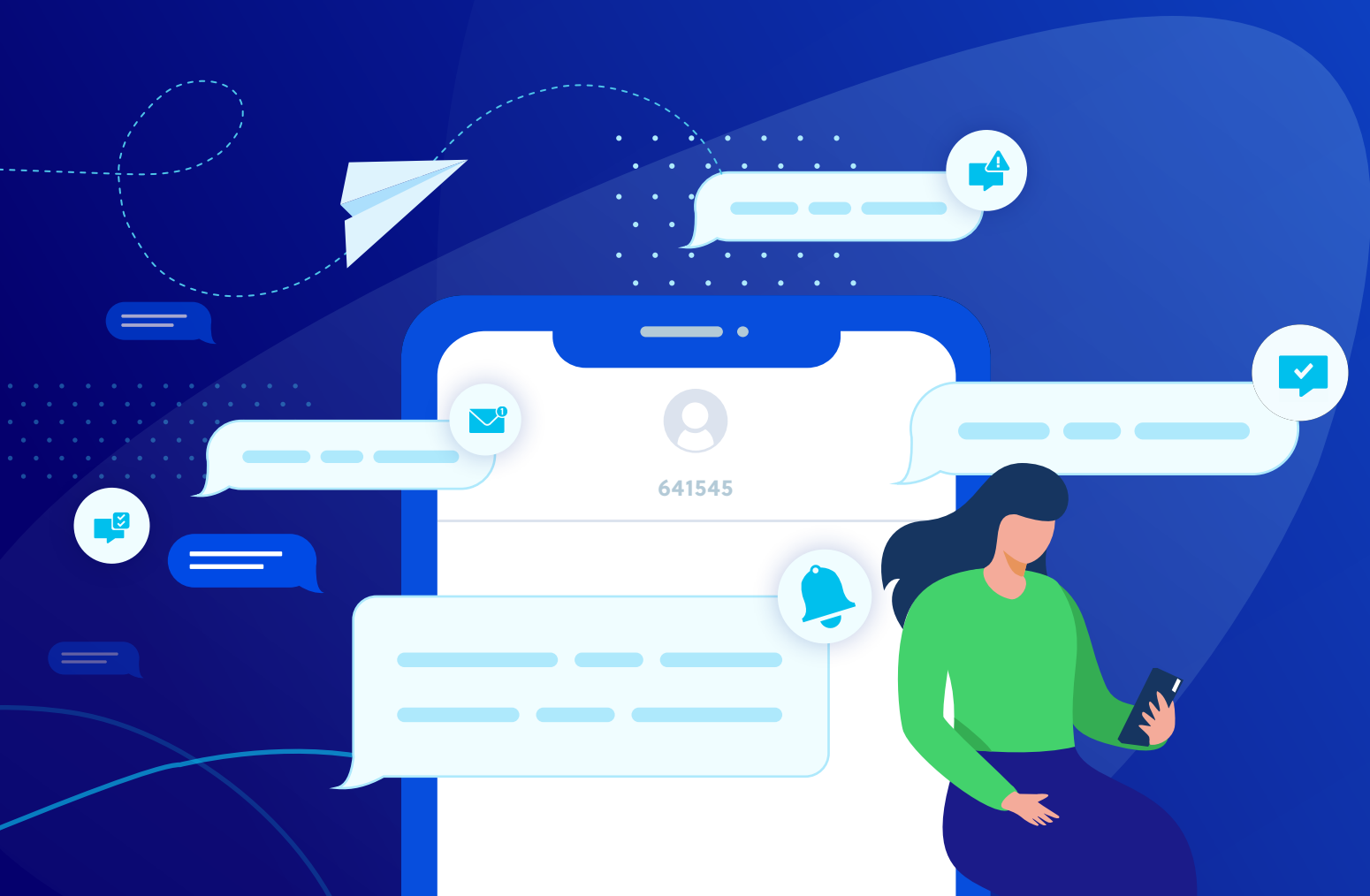**plivo**

Guide

SMS Notifications
Best Practices Guide

Introduction

Whether your business is local or global, SMS notifications help you connect with your customers. You can send customers personalized messages with information that's important to them, and give them ways to quickly complete payments, sign up for mailing lists, and perform other useful actions.

In this guide, we talk about the value of SMS notifications and how they offer a convenient, personalized way to enhance business operations and improve customer experience. Furthermore, we suggest some best practices that should help you achieve better results and engagement with your customers.

What are SMS notifications?

SMS notifications are text messages that are sent after an event occurs, such as an appointment being scheduled or a package being shipped or delivered. You can generate and schedule notifications in accordance with the business logic you deploy into your application or website.

Depending on your type of business, the notifications you send may include:

- **Password resets**
- **Account alerts**
- **Pickup arrival times**
- **Order statuses**
- **Sales lead alerts**
- **Shipping notifications**
- **Appointment reminders**
- **Server outages**
- **Customer support case milestones**

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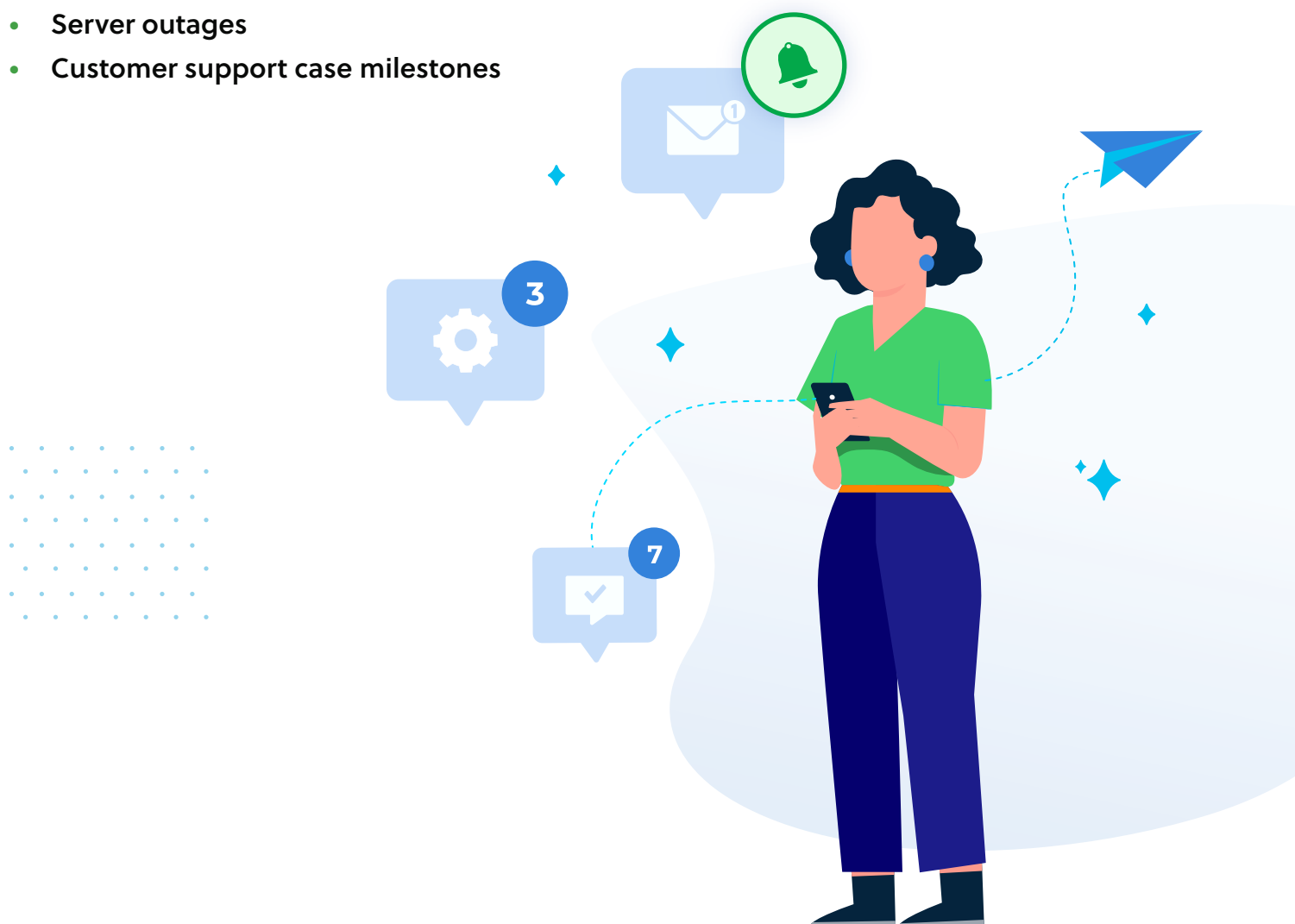
Why use SMS notifications?

SMS is a simple but powerful communication tool that can help you reach large numbers of customers with pertinent information.

SMS messages also have high open rates. They feel direct and personal, and are often perceived to be more trustworthy than other forms of communication.

How useful is SMS? Consider these statistics from TechJury.

7 billion +
people around the world
can send and receive SMS messages

75%
of consumers
are OK with receiving SMS messages from brands after they've opted in

SMS messages have a whopping
98%
open rate

For all these reasons, SMS notifications are a great way for you to increase overall engagement, via a delivery channel that consumers actually prefer.

SMS also has the unique advantage of being accessible across a majority of mobile devices. As long as a recipient's phone number is valid and the mobile network is stable, an SMS notification will get to the person you want it to reach, even if they're in another country. You don't have to download an app or install software — just press send and rest assured that your message will be delivered (assuming the provider you're leveraging is reliable — more on that later).

Some industries take it a step further and use texting for one-to-one conversations with customers to drive brand loyalty. Going back to that personal connection we spoke about, SMS gives customers the opportunity to ask questions about your products and services without needing to disrupt their daily routines. That's especially useful for ecommerce businesses, where providing real-time SMS notifications to shoppers at every stage of an order can streamline the customer experience and decrease inbound queries.

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How to use SMS notifications

With the internet and technology having taken center stage in our lives, users are more hooked to their mobile phones than ever. With its high open rates, reliability, personalization, and accessibility across most mobile devices, SMS is unmatched at bringing businesses value in connecting with their customers on the devices they use every day to quickly notify them of important information.

Here's a list of the most common use cases for SMS notifications:

Provide financial account statuses

SMS offers the financial services industry a reliable channel for alerts. When money is on the line, quick and effective communication is paramount, which is why customers are receptive to receiving SMS alerts from their financial institutions, as Plivo customers like Payoneer and Razorpay have learned. You can confirm deposits, send payment reminders, send low balance alerts, warn of late fees, and ask about suspicious activity, all in a nonintrusive way. You can also use SMS to reach out to customers to inform them about new products and services.

Share estimated time of arrival

You can share real-time tracking and transit information to keep customers updated on the location and timing of upcoming deliveries. ETA alerts are useful for on-demand retailers like Plivo customers Gojek, Blinkit, and Zomato that provide quick fulfillment of groceries, dry cleaning, pet food, and just about anything else someone can buy online. Text messages help create a constant flow of communication with customers.

Jungleworks, whose **Tookan** product is a delivery management software toolkit for on-demand services, relies on SMS to keep customers up to date with real-time text messages throughout the entire customer journey, from initial scheduling to driver tracking to order fulfillment and invoicing. If drivers or service providers are running late, they can use Tookan to notify customers via SMS. Tookan uses Plivo's number masking feature to conceal real phone numbers, which means that drivers and customers can communicate safely without compromising their privacy. This gives Jungleworks the power and functionality to deliver, measure, and constantly improve customer service on behalf of their on-demand businesses.

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Update customers on order status or delivery receipt

You can use SMS messaging to update customers at every stage, from order placement and processing to fulfillment and delivery status. Alerting customers throughout the process via text messaging enhances business-customer relationships.

In recent years, ecommerce platforms like Shopify and BigCommerce have also begun using SMS. If customers choose to enter a phone number instead of an email address during online checkout, they can receive order confirmations and shipping updates by SMS directly to their mobile phones.

California-based **Luxer One** provides lockers in residential properties for apartment dwellers to securely receive package deliveries at any time without any manual intervention from the property management staff. They leverage SMS to send package delivery notifications to tenants in the residential properties, which contain a six-digit code to open the recipient's locker. They found that time-sensitive items including groceries and gifts were more quickly received when people were notified by text rather than email. Since they started using SMS, the company has seen a tremendous increase in customer satisfaction.

In another example, footwear giant **Deckers** wanted to set better expectations and keep customers up-to-date on their orders and delivery statuses. Once a customer places an order, Deckers sends shipment updates through a series of SMS messages until the package is in the customer's hands, creating full transparency in the customer experience. As a result, the company has seen track-package calls decrease between 15 and 20% year-over-year since the launch of SMS delivery status notifications.

Improve doctor-patient relationships with appointment reminders

No-shows are one of the biggest problems for doctors, dental practitioners, and other medical professionals who operate their businesses on an appointment basis. By investing in automated message scheduling software and deploying SMS alerts and notifications, these professionals can remind patients about upcoming appointments and provide pre-appointment instructions. Plivo customer Axia Women's Health found appointment reminders especially valuable as COVID-19 raised new worries for patients about leaving their houses. Some practices take it a step further and send weekly health tips and reminders for patients to take medication or refill prescriptions — again, helping to build a stronger relationship. A quick SMS message can also alert a patient that results are available, and a texted link can lead them to a report in a patient portal. Health and wellness companies such as HealthifyMe can also use notifications to provide advice on nutrition and fitness. Online pharmacies such as Tata 1mg can tell customers when prescriptions are ready.

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Confirm reservations

Food service is a quick-moving industry, and restaurants can't afford to inconvenience diners with voicemails and confusing phone tag games. Sending them reservation text messages instead ensures that no tables are left empty on a busy night.

Online restaurant reservation services like OpenTable text directly with opted-in diners to confirm or cancel their reservations, and update reservation statuses without any interaction needed from restaurant staff. The front-of-house staff can focus on providing the best hospitality to guests who are in the restaurant, saving the business time and money.

Other travel-oriented businesses, such as hotels and homeshares, can use SMS in the same way — to confirm reservations and maintain a channel of communications between the business and its customers. Plivo customer **Houst**, a homeshare management company, assigns a unique contact number for each host's properties. Plivo customer **LAZ Parking** uses texting to foster easy payment for parking spaces. Auto rental marketplace Zoomcar texts details of reserved rental cars to customers before pickup.

Communicate safety information

SMS is a fast and reliable method for quickly notifying wide swaths of the public. Text alerts have become an essential tool for communicating public safety announcements, including police activity, service disruptions, natural disasters, and, most recently, information about COVID-19 testing and vaccinations.

By integrating SMS within their existing technology stacks and sending ad hoc or automated text messages, public agencies can reduce administration costs and improve service quality and efficiency.

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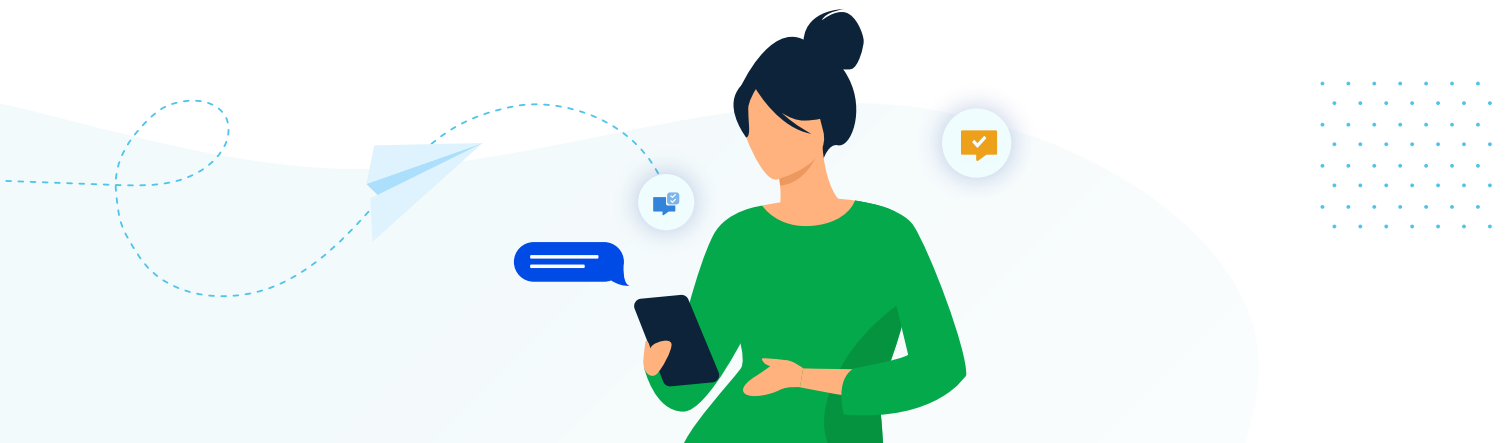
Bridge the gap between sales and leads

Text alert systems have revolutionized the way leads are passed to sales teams. They also make it easier for potential customers to get instant answers to questions, essentially helping salespeople reduce friction throughout the sales process. With lead alerts, sales teams get new, qualified leads delivered instantly.

Going beyond the immediate benefits to sales, from a customer experience standpoint, text messages can feel personal and friendly. They work exceptionally well for scheduled follow-up messages that can prevent prospects and leads from going cold. With the right platform, a salesperson can even schedule a week or month's worth of saved follow-up messages.

Sales teams can also nudge a prospect with a text message. This works well if you're waiting for someone to approve or confirm a meeting time or to book a demo. SMS can accelerate the outreach process without feeling too aggressive.

Increase profits with cart abandonment texts

By sending abandoned cart SMS messages, you can remind shoppers about what they left behind and give them a gentle push to finish their purchases. Since people are more likely to see an SMS notification than to notice an email message in a crowded inbox, abandoned cart SMS messages can lead to higher click-through rates and sales. Just like with an email, you can customize an abandoned cart reminder with an image of the items they left behind, coupons, and a one-click URL to bring them directly to the checkout page.

If a customer adds a product to their cart, chances are they're interested in your products — just because they neglected to finish the checkout process doesn't mean the story has to end. Some people aren't ready to buy yet; others just need a little incentive, or a quick reminder because they got distracted before they could finish.

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Spread the word about upcoming events

Whether you're a bricks-and-mortar location promoting a new store opening or music showcase, or a tech company trying to spread awareness about an upcoming conference, SMS notification systems can play a pivotal role in spreading the word about upcoming events.

Entertainment venues engage in a variety of tasks, including securing bookings, communicating with vendors, and marketing — all of which can be streamlined with SMS.

A few ways that you can use text messaging with your event space include:

- **Event reminders:** Keep your audience updated with weekly or monthly texts about your upcoming events.

- **Giveaways:** Hold a text messaging sweepstakes for free tickets to build buzz about your business.

- **Exclusive offers:** Reward regular showgoers with exclusive text coupons and special discounts.

The same logic can be applied to professional conferences. If you're having an early bird registration special, one way to encourage your customers to receive your SMS messaging is by promising deals and promotions open only to people who opt in. You can also set up automated confirmations for customer actions such as notifying attendees with confirmation of registration or providing an itinerary refresher on the day of the event.

Authenticate apps via SMS

Some businesses are built around hosted content. Plivo customer Pocket FM, for instance, hosts an audio series library of unique content delivered by storytellers across the world. The company, a leading audio OTT platform in India, hosts more than 100,000 hours of user-created content in English and seven Indian languages. Pocket FM has more than 15 million monthly active listeners streaming more than 3 billion minutes per month. It uses SMS to log subscribers in on mobile platforms — a practice that makes sense for a customer base that may be limited to older 3G or 4G connectivity. Microblogging platform Koo provides a platform for people to share their thoughts in any of more than 20 languages. It sends subscribers one-time passwords via SMS to ensure account security.

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Raise funds or find volunteers for nonprofit organizations

The success of a fundraiser depends on how many people you can reach and how easy you make it for them to donate. Organizations can share a unique text number with donors. When donors send a text message to that number, they receive an automatic reply that includes a link to a mobile-friendly donation page. From there, the supporter can complete a donation without having to open a mobile browser and type in a URL.

Although volunteer recruitment is a key component to an organization's success, it remains one of the biggest pain points for nonprofits. Texting can help simplify the process by instructing people to text a keyword to a number if they're interested in taking part. With texting, volunteers can quickly and easily respond to your message, so you'll also have a better idea of how many volunteers might be attending. And you can address questions people have about their roles or the event via text as well. Furthermore, SMS also lets nonprofit organizations send bulk messages to all volunteers at once in the days leading up to the event.

Keep in touch for classes

Nothing's more frustrating than traveling to school only to find your class was canceled. Public schools and colleges can use texting to send out weather-related status updates, or let their community know about emergency events that necessitate a change in schedule, as Plivo customer **Advania** does. Texting is also a great way to provide information reminders for events such as registration deadlines for classes, visitor lectures, and social gatherings. Online learning platform Byju's uses one-time password text notifications to allow students to log in.

Send internal messages to employees

Improving internal communication channels is a top priority for many companies, so it makes sense for them to leverage SMS for time-sensitive information. With SMS you can alert staff about on-site emergencies and staffing requirements, announce a new work policy, send meeting reminders, and let people know about changes to their schedules. We've even heard of companies using SMS to remind team members of birthdays. Companies can also solicit employee feedback with a text-to-vote poll.

As important as it is to focus on external communication with customers, a company without strong internal communications is essentially disorganized. Sharing information with team members via texting shows that internal communications don't have to be difficult.

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How to succeed with SMS notifications

We've covered when and where SMS notifications may be applicable to your business, but what about how? How do you ensure that your SMS notifications are both relevant and compliant with legal restrictions, while still ensuring the best results and engagement?

Permission and compliance

As with all kinds of messages in the SMS space, gaining permission and having users opt in is the first and most important step. Failing to do so makes you seem less reputable to customers and may result in fines from telecom providers and some jurisdictions. Once a customer has opted in, you must also do your due diligence in protecting their data. Cloud communication providers like Plivo build in security and privacy safeguards so that you don't have to deploy compliance features into your applications yourself.

Sharita Passariello, Senior CRM Manager at Plivo customer **Fluent**, says, "It is extremely vital to me that we have expressed consent for these SMS messages. [so] the user knows exactly what they're going to receive, what kind of updates they're going to get, and who the updates are coming from. That's so critical because it helps with overall long-term sustainability and performance. At the end of the day we're using SMS to provide a service to our consumers. We'd like to help them." In other words, consent isn't just the law — it's also good business practice.

Timing is everything

The timing of your text messages always matters, and determining the optimal time to send to a list can improve your text campaign's performance. The way to decide when to send messages is to determine when you're most interested in your customers taking action.

For example, if you're a restaurant offering a lunchtime discount, schedule your texts for the midmorning, so that your offers will be on your customers' minds when they're deciding on lunch. Aim for times when your customers won't be busy, like before or after work, and always respect sleep patterns.

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Personalization

To overcome people's dislike of cold contacts, you should demonstrate through thoughtful, relevant messaging that you can provide real value to the people you're trying to reach. To do that, you need personalization. Use your subscriber's name, and always keep the customer benefit at the front and center of the message. Personalizing your messages lets you build deeper relationships with customers and treat them as unique individuals. Being authentic is equally important.

Track and measure your results

You always need to be thinking about measuring your SMS campaigns' effectiveness. Looking at things like list growth rate, response rate, acquisition cost per subscriber, and return on investment can help you identify which areas need improvement, so that you can take action and elevate the overall user experience.

Speedy go-to-market and seamless infrastructure

Whatever your use cases, using a single platform to manage all your communication speeds up your time to market and takes fewer resources and less time to maintain. Cloud-based APIs like Plivo's makes it easy to integrate SMS messaging capabilities with your internal applications without writing a lot of code. You need a platform that can evolve with the needs of your customers.

Prioritize deliverability

When your text alerts are time-sensitive, it's imperative that people receive the messages immediately. You should work with a provider that has direct relationships with carriers all around the world, and that understands the complexities and ongoing changes in telecom infrastructure. Make sure they can guarantee high deliverability, and that they can offer a fallback to a voice call in case a text message goes undelivered. Avoid platforms that use SMS aggregators, which often utilize unreliable "gray routes" because they lack a direct route from the sender to the subscriber.

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Where Plivo comes in

When you decide to employ a mass communication SMS service, choose a leading cloud communications platform with an enterprise-tested track record for reliability, security, and ease of use. Your platform should offer global connectivity, giving you the ability to reach nearly anyone in the world instantaneously. Make sure it handles all of the logic for tasks such as user segmentation, privacy, and security, so you can focus on what matters: sending effective and relevant messages to your customers.

Reliability

To minimize delays as messages go out to customers across multiple networks, your carrier should employ automated quality checks and route around delays. Plivo deploys simulated handsets as test nodes across all countries with multiple carriers, provisioned with real phone numbers from carriers local to each region. We send messages to these test nodes, and the results we receive back help our dynamic routing engine intelligently route messages to ensure speed of deliverability.

This means you can quickly reach your customers in 190+ countries, because we're constantly monitoring traffic patterns to prevent delivery issues and assess which route is best-suited for the type of communication you're using in real time.

Security and privacy

From intelligent route monitoring and automated routing changes to using machine learning to prevent fraud, Plivo ensures that our network is secured physically and virtually, and that our customers' data and payment information is both private and secure. We've earned SOC 2 Type 2 certification for securely managing customer data, and we're certified compliant with PCI DSS Level 1. Businesses that need HIPAA compliance can get it by signing up for our Enterprise package.

Our platform has built-in geographic permissions that let you disable calls to high-fraud destinations. Our default throughput limits prevent new Plivo customers from immediately sending high volumes of messages or calls, and we use artificial intelligence and other instrumentation to look for patterns that might indicate abuse.

To keep personal data private, we offer number masking, which lets two parties establish a call without revealing their contact information. We also support data redaction, to limit how SMS usage data is retained in Plivo's log files.

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Ease of use

With Plivo, you can programmatically create personalized SMS alerts and notifications for any type of activity on customers' accounts. Plivo's REST APIs are easy to work with, and their syntax should be familiar to developers who already have experience with a cloud communications API.

Plivo doubles down on ease of use by providing Plivo High-Level Objects (PHLO), a visual design studio that lets you create custom communication workflows for both voice and SMS with little or no coding. PHLO employs prebuilt templates for tasks such as alerting, IVR, surveys, and voicemail, so you can shorten your development cycle. Once you've created a workflow in the visual designer, you can modify the code and customize it as you like.

Plivo also provides white glove support to simplify the experience you have with carriers. For instance, we streamline the process for registering sender IDs, so you can register for multiple sender IDs with varying requirements in the same workflow.

Fast, reliable SMS is your best communication option

As more and more interactions become digital, SMS will continue to play a crucial part in enhancing the overall customer experience. Plivo makes integrating customizable SMS and voice messaging into your platform an easy, fast process. Join the businesses below who follow the best practices in this document to enjoy fast sharing of information, high message open rates, wide reach, and elevated customer satisfaction.

You're in good company

DECKERS — BRANDS —   gojek   Zoomcar Never Stop Living

zomato   Razorpay   Pocket FM

HOUST   Jungleworks   Payoneer

BYJU'S The Learning App   LAZ PARKING   Koo

LUXER ONE   blinkit   FLUENT