GROWERTALKS

Features

11/1/2022

SMS for B2B

Katie Elzer-Peters



Dentists do it. So do hair stylists. My pest control company uses it. So do the airlines. “It” is SMS messaging and marketing, and it’s becoming a routine part of customer service for a broad spectrum of businesses. You know what that means for the green industry.

“Customers come to expect that service if they can get it everywhere else,” said Jamie Heflin, Marketing Project Supervisor for Midwest Groundcovers. The good thing about SMS marketing and communication is that, compared to other types of marketing and communication, it’s remarkably simple, straightforward and quick to get a basic SMS program going. From there, you can grow the service.

Here’s everything you need to know to get started with SMS for B2B.

SMS 101: What is it?

SMS stands for “Short Message Service.” Sounds like a perfect thing to do over text message, doesn’t it? For all practical purposes, SMS and text marketing are the same. MMS stands for “Multimedia Messaging Service” and refers to an SMS message that contains a picture or other type of “media.”

There are two main “buckets” of SMS communication: one is transactional, like what you get from DoorDash. “Your driver is approaching with your meal.” “Your order has shipped.”

The other is marketing. “XYZ plant is back in stock.” “15% Pre-book discount ends tomorrow.”

How does SMS Marketing work?

SMS marketing requires using a service such as Twilio, Attentive, Klaviyo, Podium or others. (The same way you use a service for marketing emails.) Some CRM programs such as KEAP also offer SMS capability. You’ll set up a phone number through the service and you’ll manage everything for the SMS program: customer sign-ups (opt-ins), campaigns and, if you choose to enable them, conversations with customers.

You don’t text people from your own phone number—you text through the number set up by the service. Some

services, such as KEAP, allow you to set up replies to come to your phone, but your personal phone number is masked. You're actually still texting through the system.

When setting up your account, you'll create a "contact card" for this business number. Make sure to upload a logo or icon associated with your business as part of this card. This will act like the "profile picture" for the contact and will help customers identify that the texts are coming from you.

Once your SMS account is set up, here are your next steps:

• Create opt-in forms and (if your website is set up for it) build opt-in for SMS as part of your online account setup process for new customers.

• Set up your welcome message and any other workflows you'd like to use.

• Draft and schedule a series of messages to highlight key dates/ benchmarks/offerings to your SMS customers, such as prebook discount end dates or "XX Season shipping now" alerts.

How does Transactional SMS messaging work?

Transactional SMS messages for delivery notifications are usually sent via a service or software related to delivery scheduling or through a CRM.

Michelle Erwin, Business Develop-ment Manager for Clesen Wholesale, said, "Our customers have the option to indicate which type of delivery notifications they want, including text, email or both. That's indicated in their customer profile, and when we send order information to our transportation department, those preferences are attached. Transportation uses OptimoRoute to plan their delivery routes, and both SMS and delivery notifications are sent from that software.

"The customers really like the option to receive SMS notifications, especially for the 'You're our next stop' heads up. That way they can be ready to accept the delivery, even if they aren't at their desk checking their email."

Another good reason to treat SMS as permission marketing is that you need to be compliant with federal TCPA (Telephone Consumer Protection Act) regulations, which require express written consent to contact customers via SMS. (You can find those regulations at fcc.gov/sites/default/files/tcpa-rules.pdf.)

Why offer SMS for B2B customers?

Like Jamie said, customers are starting to expect it as a service from all of their vendors. It's quickly becoming a must-do, rather than a "might-be-nice." However, there are other benefits to SMS. It has great open and response rates, customers respond quickly to SMS messages, and it's quick for YOU to create SMS messages.

When should you use SMS?

There's the temporal "when," as in, what time of day. For business transactions, between 10:00 a.m. to 3:00 p.m. in the recipient's local time zone is likely to get you the best results. Don't send B2B texts on weekends, holidays or evenings unless you offer customers the ability to choose when during the day they'd like to receive messages.

Then there's the "when during the sales cycle" should you use SMS marketing? One key to SMS, along with email, is setting a regular schedule, telling your customers and sticking to it. At the point when people opt in for marketing SMS messages, let them know what your frequency is and what they can expect. For example, "We'll text on Wednesdays at 10:00 a.m. with what's looking good, any promo cut-off dates, etc." I recommend at least one weekly text.

If you have the ability, automated marketing messages are a great way to use SMS. (See the Midwest Groundcovers Case Study in the sidebar.) Back-in-Stock messaging is the most natural fit for B2B SMS.

Finally there's the "when during the transactional cycle" should you use SMS marketing? This depends on how your CRM is set up or whether you have the technological infrastructure (phones, iPads, connection to CRM, etc.) to do it. The two to three messages that can be the most impactful for customers are "You're scheduled for a delivery this week," "Your delivery will arrive today" and, one that Clesen Wholesale sends, which is "You're up next!" once the driver leaves the previous stop.

What should your SMS messages contain?

That depends on what your goal is:

* **Sales:** Include a link to online ordering, any pertinent deadlines and a photo of the beautiful items on offer.

* **Transactional:** Include a sentence about what's happening. "We're on our way" and any relevant links to track a delivery truck or order.

* **Informational:** Care tips with a picture or a fun meme (if it fits your brand).

Which SMS service is best?

Choosing a service depends entirely on your current website and inventory management system, and the goals you have for the service. Ask yourself (and your marketing or IT folks) these questions and then compare your needs with the offerings of various services. You might need to do some customization to create the ideal system, but there are many choices and you're certain to find one that works.

* Do I need this to integrate with delivery communication?

• Do I want people to opt into "back-in-stock" messages?

• Does my SMS need to connect with email?

• Does my CRM or delivery routing software offer any type of SMS service?

What NOT to do when choosing a service: Ask everyone you know UNLESS their situation and needs are almost identical to yours. Tech solutions are highly contingent on resources and circumstances, and what might work for one business may not work for another.

Sometimes a delivery software option and a CRM or ERP software are very compatible and easy to integrate and other times they would require a bunch of custom coding. Whenever possible, it's best to find and use services that work together with a minimum of customization. Every time you write custom code for a tech solution there's a high probability that it will break or need to be updated whenever one part of the system updates and updates aren't usually within your control, especially with SaaS (software as a service) programs like SMS messaging platforms.

If you've been thinking about adding SMS to your marketing, now is the time to work on it so it's ready to go in spring. Happy texting! ☺

> **Pro tip:** SMS should be considered "Permission Marketing," which is a concept or a term coined by Seth Godin in 1999. Permission marketing means that people sign up or opt in and give you permission to market to them. Whether you're using SMS for marketing or delivery notifications, get permission from your customers. This communication is immediate and personal since it will go to their phones (even if it originates through a service). If customers aren't offered a choice, they can report your communications and affect your ability to communicate with anyone in that way.

Case Study: Midwest Groundcovers “Back-in-Stock” SMS Notifications

This spring, Midwest Groundcovers rolled out a new feature for customers: Signing up for “Back-in-Stock” SMS alerts.

“We had the idea for a long time. To implement back-in-stock alerts, you need to have accurate live inventory, though,” said Jamie Heflin.

The industry is going that way, but live inventory is a huge lift and requires a lot of coordination and programming. Once you have it, the services you offer to your customers almost infinitely expand.

How it works

Back-in-stock alerts are easy for customers to opt in to. Once they’re logged into the MWG website and looking at plants, they’ll see that each plant that’s out of stock will have a bell next to it. Customers can click the bell to be notified and then confirm the request. Once the plant is back in stock, they’ll get a message.

How they knew it was time for SMS alerts

Jamie said, “We’re always looking for ways to make systems easier for customers to navigate. We look at what other companies are doing. For example, I might notice that on Wayfair, if I want something that’s out of stock, I can sign up for alerts. As a customer, I really like that. We want to provide that service to our customers.”

How they made it happen

“There was some customization involved and some programming to integrate the SMS software with the website. And the website is integrated with the ERP system,” Jamie said.

They selected Twilio as the SMS service, and integrating it was fairly straightforward. “We have a systems development programmer and we can contract with outside help as needed,” Jamie added.

The lengthiest part of the process of implementing real time back-in-stock alerts is always going to be the live inventory component. Once that’s squared away, stacking SMS on top is more easily attainable. **GT**

Katie Elzer-Peters is the owner of The Garden of Words, LLC, a green-industry digital marketing agency. Contact her at Katie@thegardenofwords.com.