



**MOBILE ENGAGEMENT**

**AUTOMATION: IS IT**

**RIGHT FOR YOUR**

**BUSINESS?**

Mobile engagement is a must for any business, but what that looks like in practice can vary wildly. That's why we created a full guide explaining what your options are, why mobile engagement automation is often the best path and how to sell the strategy to leaders in your company.

Mobile engagement used to be manageable — build an app or create a mobile friendly site, then launch one-to-many campaigns to drive people there. Automation was overkill. After all, you were only dealing with a handful of messages.

If that's nostalgia you're feeling, we understand.

Today, one-to-many messages just can't cut it. Users receive so many requests for their attention, only the most compelling will ever earn engagement. And to be compelling, you must be mobile, personalized and proactive.

That's where mobile engagement automation comes in. With the right platform, you can deliver real-time mobile engagement that's tailored not just to your customer, but to your customer's micromoments. All those little points along their journey are what make or break your customer's relationship with your brand — and determine their lifetime value.

But mobile engagement automation isn't the only tool out there. Whether you're just starting the process of deciding between mobile engagement services or already working with a mobile engagement company and wondering if you could be getting better results, we'll help you understand the landscape, evaluate the offerings and decide what's best for you.

## Mobile is the new face of engagement — and here are the statistics to prove it

You need to look no further than the latest mobile engagement statistics to realize just how critical mobile engagement is. According to the recent Forrester Wave report, "The next battleground to win, serve, and retain customers is in the moment." And yet per the same report, those moments total more than 30 billion. Per day. In the U.S. alone. Mobile Engagement Automation (MEA) gives you a way to message to those moments at scale. By mapping your customer journey, you can identify the recurring points of friction for your audience. Then you can use MEA solutions to automatically send messages based on different triggers — a change of address say, or an upcoming bill — or based on a schedule.

*"Consumers demand mobile-first, contextual experiences. Enterprises must pivot toward delivering proactive, hyperpersonalized content and services when and where a consumer needs or wants them."*

**-FORRESTER**

Proactive CX is the future of mobile engagement. But its effectiveness depends on the mobile engagement tool you end up using. To find the option that will work best for your business and your customers, we've created a guide to what's out there.

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## The 5 most common types of mobile engagement solutions

There are lots of ways to create a mobile engagement digital experience, but they're not all equal. Here's what you need to know:

### 1. Apps

Native apps are powerful assets that allow for account viewing, information and product usage — plus they give companies the ability to message to users via push notifications. They're also expensive to create and maintain, and they require customers to download them and regularly choose to engage with them. That may be possible for games or consumer entertainment brands, but considering the average consumer downloads zero apps per month, for most companies, it's not an option.

### 2. Portals

Many service providers include portals in their digital strategy as a means for customers to take actions and access services. Much like apps, however, they demand considerable investment to build and maintain, and they expect customers to opt for self-service, locating the tools and information they need on their own. And since they are built for all people and all use cases, it can create content overkill that just leaves customers confused and frustrated.

### 3. SMS

SMS is a great notification method. It's inexpensive, easy to update and more and more consumers prefer it. It's also limited to 160 plain-text characters, so it simply can't provide customers with rich experiences. And it's not a secure medium, so PHI and other sensitive data can't be sent via text. Plus, stand-alone SMS providers require you to collect and manage your customers' mobile numbers and permissions in order to stay TCPA compliant – a tall order for businesses that don't have that data already.

### 4. SMS-to-Landing Pages

Landing pages solve for the 160-character limit of SMS — now you can send people from a simple notification to a full webpage. While useful for directing users to mass-produced content, they lack individualization, so you can't provide that personalization that makes mobile engagement metrics soar. And you still have to collect mobile numbers and permissions if you want your messages to reach a broad audience.

### 5. Mobile Engagement Automation

Mobile engagement automation solutions are quickly becoming the go-to tool for creating engaging customer experiences on mobile because of the way they blend the solutions above. MEA gives you a way to deploy, maintain and optimize personalized app-like mobile experiences at scale in order to meet customers' in their moments of need. While the specifics of the solution vary by service provider, they all let you set up a system of automatic, mobile messages that send based on calendar events, business needs and, most importantly, moments in the customer lifecycle. As those moments become smaller and smaller, businesses will no longer be able to rely on old standards like apps and portals that do all things for all people. Rather, they'll need a tool that allows them to spin up individualized microexperiences at any time. As CX becomes the competitive battlefield, Forrester predicts a rise in MEA solutions.

## Choosing the right mobile engagement platform for your business

Which solution you choose depends entirely on your business. If you're a consumer brand customers want to hear from, engagement may be easy. If you're a service provider, on the other hand, engagement may be tougher. And if you have regulated customer information, like many Relay clients do, engagement may be tougher still, requiring a tool that's purpose-built to engage customers who may otherwise drop off.

Any way you choose to engage on mobile is better than not engaging at all, and all five mobile engagement strategies provide useful functionality. It's only a mobile engagement automation tool like Relay, though, that can stand in for the other four options. We give you a single plug-and-play solution that can manage your entire mobile customer experience, taking you from passive engagement to proactive CX.

The proof is in the user engagement data. Our clients have seen massive leaps in their mobile engagement that have driven a 40 percent faster loan application completion time for Citizens Bank, a 175 percent increase in people reviewing their plan information for a health insurance company and a 32 percent reduction in inbound calls for a cable company that used Relay to guide customers through self-installations. These results translate into real retention, and real dollars.

## A mobile engagement automation definition for key stakeholders

Just like any tool, the more business units that benefit, the easier it will be to get funding approved. Aligning your mobile engagement strategy with the metrics your lines of business value will help you gain internal support, giving you the best chance for success.

Here are a few stakeholders who can benefit from mobile engagement automation — and how Relay can help:

Target Role	Common Challenges*	Benefits with Relay
<p><b>Marketing Leader</b> (aka CMO, SVP, VP, Director Marketing)</p>	<ul style="list-style-type: none"> <li>• Increasing pressure to drive strategic growth and retention</li> <li>• Reaching and engaging customers digitally</li> <li>• Achieving and articulating results from marketing investments</li> <li>• Creating a seamless experience across channels</li> <li>• Using data for ongoing targeting and measurement</li> <li>• Balancing operational, strategic and transformational agendas</li> </ul>	<ul style="list-style-type: none"> <li>• Make an immediate and measurable impact on your customer engagement strategy and prepare your organization for future trends and opportunities with a new ability to reach and engage customers on mobile</li> <li>• Accelerate adoption of your digital assets and increase return on those investments.</li> <li>• Integrates with your existing marketing automation systems.</li> </ul>

Target Role	Common Challenges*	Benefits with Relay
<b>Customer Experience Leader (aka Chief Customer Officer)</b>	<ul style="list-style-type: none"> <li>• Understanding changing customer behavior and preferences</li> <li>• Designing experiences for complex, in-the-moment, or unpredictable customer journeys</li> <li>• High reliance on technology resources</li> <li>• Ongoing competitive threats by disruptors that focus on customer experience</li> </ul>	<ul style="list-style-type: none"> <li>• Scale your customer support efforts and meet rising consumer expectations for easy and effective communications and service that improve CSAT and reduce customer's need to call.</li> <li>• Create and deliver turn-key customer interactions and optimize workflows for the best results without writing a line of code or ongoing investments.</li> </ul>
<b>Multichannel Marketing Leader (aka Marcomm, Marketing Ops, Brand Management)</b>	<ul style="list-style-type: none"> <li>• Limited experience in emerging digital technologies and techniques</li> <li>• Renewed pressure to prove investments have a direct impact on revenue, customer retention, and satisfaction</li> <li>• Developing interactions that work effectively across channels</li> </ul>	<ul style="list-style-type: none"> <li>• Augment your multichannel strategy with a high performing mobile channel that aggregates all customer engagements, integrates with your orchestration systems, and builds strong, loyal customer relationships</li> </ul>
<b>Product Owner</b>	<ul style="list-style-type: none"> <li>• Increased pressure to identify new customer acquisition, retention and growth strategies</li> <li>• High risk of churn due to increasing competitive threats</li> <li>• Influencing customer behavior</li> </ul>	<ul style="list-style-type: none"> <li>• Gain a new ability to pull customers through lifecycle events and close knowledge gaps, resulting in higher ARPU and stickiness</li> </ul>
<b>IT Leader (aka CTO, IT Director, Sr Director Application Development)</b>	<ul style="list-style-type: none"> <li>• Staying ahead of leading edge applications, architectures and strategies that create value, drive engagement and enable digital business transformation</li> </ul>	<ul style="list-style-type: none"> <li>• Accelerate digital workplace initiatives, enhance customer experiences and drive agility and innovation without displacing or changing your core systems</li> </ul>

## The value of a partner who can go beyond automation and deliver a mobile engagement strategy

Successful mobile engagement depends on the answers to so many questions: How will you drive user adoption? How will you remain compliant with regulatory requirements? How will you create high-performing customer experiences? How will you integrate with your existing systems? How will you measure success and gain internal support?

Creating a total solution by piecing together parts isn't efficient or effective, and building your own can be costly, and worse, put your organization at risk.

Finding the right mobile engagement partner gets you out of those traps, so you can engage customers directly. And with a mobile engagement automation tool like Relay, you can do so proactively, staying one step ahead of customers to solve for their frustrations and create delight around even the most everyday interactions.

# THE CRITERIA

WHEN YOU'RE READY TO START TALKING WITH **MOBILE ENGAGEMENT AUTOMATION** PROVIDERS, THIS QUICK CRITERIA CHECKLIST WILL HELP YOU EVALUATE THE 10 FEATURES THEY NEED TO OFFER TO WIN YOUR BUSINESS.

10 must have things you should expect from your mobile engagement automation partner:

## □ **INDUSTRY EXPERTISE**

Every industry has its unique set of micromoments — bill explanations, managing moves, understanding health care plans. Find a partner who's already familiar with the CX friction points, ideal journeys, compliance guidelines and trends in your industry, so they can make informed recommendations.

**Relay:** Our teams are organized by industry — including healthcare, banking, insurance, cable, energy and more — so each one can bring clients expert guidance and know-how.

## □ **A MOBILE CONSENT CAPTURE, STORAGE, AND MANAGEMENT SYSTEM**

This is essential for staying compliant with TCPA regulation. A partner who already has the capability to capture, store and manage mobile numbers and consent will help you onboard users faster and stay on the right side of the law.

**Relay:** Our platform includes an onboarding engine that tracks, updates, time-stamps and records all changes to your customers' consent in real-time. And our ongoing TCPA monitoring service gives us access to over 250 data sources that are updated near real-time, so we know the moment a number ports to a new individual.

## □ **TCPA-COMPLIANT SMS CAPABILITIES**

It's not just capturing initial consent. It's what you do with that consent that really matters. TCPA compliance requires several steps, and not all SMS providers can manage them. Make sure your mobile engagement partner can provide the right technology and guidance so you *remain* compliant.

**Relay:** Our complete solution gives you greater protection by letting you automate messaging based on consent type (e.g. marketing vs non-marketing). Plus, our Client Success Managers will provide guidance not only on how to capture consent, but what messages you can send with that consent.

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## □ FLEXIBLE IMPLEMENTATION OPTIONS

Your partner should share the work of designing the right mobile engagement solution, not leave it all on your shoulders. Find a team that will meet you at any stage of technical or resource readiness without judgment.

**Relay:** Our flexible implementation options offer something for everyone, whether you want to connect via API, upload data files or work directly in our CX Builder.

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## □ PROFESSIONAL SUPPORT

You don't want a partner who will bill and run. Look for an MEA provider that has a team trained to help you execute the whole project successfully. That's a sign they truly value the solution.

**Relay:** Our team won't just train you to use Relay — we'll work alongside you, using our experience to help you design solutions, onboard customers, create journeys, measure ROI and find opportunities for growth. Each partner gets a dedicated Client Success Manager trained in project management to deploy your program on time and within budget, and keep it running smoothly.

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## □ A SECURE YET HIGHLY-ENGAGING DIGITAL CHANNEL

Security is necessary, but so is accessibility and ease of use — neither can come at the expense of another. The right MEA partner will give you a channel that can do both.

**Relay:** Our unique combination of text notifications and personalized web pages gives you higher engagement than other channels while staying secure enough to be HIPAA and PCI compliant.

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## □ SPEED TO MARKET

One of the main benefits of MEA is that it doesn't require the same upfront investment as building apps and portals. That's true of time too. You want a partner who can get your CX solutions to market faster than your competition.

**Relay:** With Relay, you can be engaging your customers in less than 90 days. There's no cobbling together point-solutions, overhauling your existing systems or running the risks of custom tools. Just one complete tool for your CX.

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## □ TURNKEY MOBILE WEB EXPERIENCE CREATION

If it's not easy, no one will use it. That applies to your messages to customers, and it also applies to the platform you use to create them. Make sure you're getting a solution your entire team can use — without requiring IT or agency support.

**Relay:** Our CX Builder gives businesses the power to create, deliver and automate individualized mobile web experience in minutes, without writing a line of code. With it, you can quickly create and test journeys, make real-time updates and optimize results based on individual customer needs.

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## □ AUTOMATE ENGAGEMENT

Forrester pegs the current tally of micromoments at 30 billion per day, in the U.S. alone. Automation is the only way to keep up. Your solution needs to provide a way to truly automate personalized customer messages, so you can engage at scale.

**Relay:** Our solution helps you scale customer engagement by creating proactive, personalized mobile experiences that get delivered automatically based on the parameters you set. You can send messages immediately, schedule them for certain times or trigger them based on actions in your existing CRM or CSP systems.

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## □ PROJECT JUSTIFICATION SUPPORT

The right partner will be willing to put data where their sales pitch is. Find someone who can help you create a business case and justify it internally to key stakeholders, then recommend opportunities as you grow. That will save you time, and prove they can deliver.

**Relay:** To help you create the best engagements, our team needs to understand the business case as much as your stakeholders. We'll work with you to find the ways Relay can help, then help you develop business case justification to help you build internal support. Once a shared vision of success is defined, your Client Success Manager will keep a close eye on the metrics and provide recommendations to make sure we hit it.

To learn more and receive a free demo,  
you can reach us at [sales@relaynetwork.com](mailto:sales@relaynetwork.com).