



Practical guide to

Mastering SMS and messaging apps

WhatsApp, Facebook Messenger, Instagram, Google Business Messages, Apple Business Chat, SMS, X



Build out your digital channels in phases.
It's easier to track your progress and make
the most impactful improvements.

Phase 1:

Walk – Master the basics

Phase 2:

**Run – Orchestrate
better journeys**

Phase 3:

**Fly – Drive performance
with empathy**

Why SMS and messaging apps and why now

Digital channels make it easy for customers to engage with a brand on the channel of their choosing.

Today, the opportunities to build a digital presence with customers are nearly endless. And SMS and messaging apps are a great way to do it. Consider the massive reach of SMS: With more than six billion smartphones worldwide, nearly everyone can send and receive SMS texts. Plus, more than 60% of consumers in the US want to text vendors for customer service.

The number of people on messaging apps is also hard to fathom, but it's even harder to ignore. Top apps each claim more than a billion global users — across all demographics. With a third of the world's population communicating digitally, consumers expect businesses to support this new way of engaging.

86% of consumers say a company is only as good as its service; and CX leaders cite keeping pace with customer expectations as the greatest challenge they face today

"The State of Customer Experience," Third Edition, Genesys, 2023

A look at SMS and top messaging apps

WhatsApp

WhatsApp is the messaging **market leader in Latin America** and dominates in many countries in Europe and Asia-Pacific. Unlike Facebook Messenger, WhatsApp doesn't connect to public social profiles, just to private phone numbers. The WhatsApp Business Platform makes it easy for people using WhatsApp to connect with you.

Facebook Messenger

Facebook Messenger is more open than WhatsApp and easier to get started with customer support. It's connected to the world's largest social network, where you likely have a business page or ads. Plus, customers have private accounts. When they see your post or ad, it's easy to click to your Facebook page to message you directly.

Apple Business Chat

Apple Business Chat lets you answer customer questions and resolve issues — like other messaging apps. Customers can complete transactions via Apple Pay, and Apple users can find your business and start conversations from iOS apps like Safari.

SMS

SMS texting is independent of a platform and the internet. It's widely used in North America for communicating about promotional material, two-factor authentication codes and more.

For marketing, **SMS has huge opportunities:**

- SMS have a 19% CTR, compared to 4% for emails
- 48% of consumers prefer direct communication from brands via SMS text message
- 95% of text messages are read within three minutes of being received

X

X (formerly Twitter) is seeing increased use of direct messages as people reduce their public posting activity. In response, X has rolled out new features, including support for uploading private photos in DMs. X interactions are a good platform for updating your customers.

Instagram

Instagram is the second-largest social network, with a reported **two billion users**. With Instagram Direct Messaging, users can interact with stories you create on Instagram and send messages that can lead to a private exchange of texts, photos and posts — creating more meaningful relationships via personal connections throughout the customer journey. And end users can “@story” mention a company, also leading to an exchange.

Google Business Messages

Google Business Messages is an asynchronous messaging service that allows users to get in touch with brands if they might have an inquiry. There are a multitude of entry points that these inquiries can come in, including over Google Search, Google Maps and Google Ads.

Decide which app will benefit your business the most

Your customer experience is only as good as your team. If they can't deliver on your strategy, your customers suffer — and so does your business. That's why it's critical to invest in your workforce to keep them engaged, performing and committed to your organization.

Today, it's harder than ever to cultivate higher performance and keep your team happy. With a multigenerational workforce, rapidly expanding AI adoption and rising customer demands for efficient, personalized engagement, the burden on your customer experience (CX) talent gets heavier every day. At the same time, employees now have bigger expectations for their employers — and more options when they're disappointed in the employee experience.

Balancing business needs with customer and employee needs is a perpetual challenge. The key to getting it right is understanding your employees' expectations and meeting them with effective workforce engagement management (WEM).

Create a plan for customer success

Your strategy for messaging apps should reflect the dynamic nature of social media. Set those expectations in your plan. Use industry trends to better understand why you need to start now and how messaging apps will serve your business and customers. For example, specify your internal and external communication plans, training and expected milestones.

Whether you've already implemented one or more messaging apps and want to get more from them, or you're trying to figure out where to begin, this guide can help.

Walk

Master the basics

83%

of customers now expect
immediate engagement when
they contact a company

"State of the Connected Customer," Salesforce, Fourth Edition

Build the foundation for messaging apps

“Walk” is the discovery phase for businesses, as it gives customers and prospects new ways to connect with you. You’ll start exploring which new digital channels to add to your mix. And as you do, you’ll begin developing a foundation that can scale to support future channels, expand the ways customers can engage with your brand — and build on your initial success.

Use case – Step 1

Samantha was planning a vacation. While browsing Facebook, she saw an ad from a resort she stayed at years ago. The ad mentioned an offer for longtime visitors. Interested to see if she qualifies, Samantha clicks to send a message via Facebook to the brand to ask her questions and learn more.

Define roles and responsibilities

One of your first tasks will be to define roles, responsibilities and transitions across business units. Plan how you'll hand off an engagement, when needed. If marketing manages Facebook and a service question comes in, a seamless transition to the service team means a better customer experience.

Take time to understand the capabilities and rules for each messaging app. Because third parties own these channels, you'll have more limited insight into the customer journey while on those channels. But you can still collect data on your engagement activity and add it to your CRM system.

Think about conversations based on engagement type. Customer service will handle inquiries, while sales will assist with purchases. Marketing will answer questions about brand, campaigns and other posts. If you plan to route everything through customer service, be prepared to set up some self-service functionality to mitigate the burden on agents.



Equip employees for success as you adopt new channels

Train agents on the specific digital channel

They might be familiar with its use for personal reasons, but don't know best practices for using it as representatives of your business. If they're confident in offering support via messaging, it'll improve the customer experience.

Set realistic expectations

For example, agents will handle more interactions, not fewer. And these queries might not be familiar ones. Yet, customers will expect a faster response — if it's during business hours — and a resolution in one interaction.

Keep the same interface for all digital channels

To simplify onboarding, funnel conversations into a single workspace for agents. Give them easy access to canned responses for common questions. Ideally, this interface should consolidate queues, from email to custom chat to messaging apps.

Understand your agents

Have they primarily done phone support? If so, concurrent message management could be a new skill to learn. With voice, they might handle one call at a time. But with messaging, it can be multiple conversations — all with different issues.

Pro tips

- Speed matters. A customer who direct messages you on X, for example, and doesn't get a quick response might escalate with a public tweet. Fast responses help avoid potential damage to your brand.
- Evaluate how staffing needs will change and shift resources, as needed.
- Encourage agents to personalize canned messages, when appropriate, for more authentic conversations.
- Give employees visibility into their performance to drive ongoing self-improvement.
- Depending on your customer contact volume, decide if you need dedicated messaging agents or whether blended channel agents work best.

Ensure superior interactions

You're giving your customers a new way to engage. Make sure it's a positive experience:

- Create clear policies and guidelines for agents about engaging on messaging channels. Reinforce that these are public channels and any information they provide can be shared easily. That opens the door to brand damage if appropriate policies aren't followed.
- Provide a consistent experience across messaging apps and other channels balanced with your brand voice. Recording interactions and using those insights for quality assurance processes and employee training is one way to do this. As text-based channels, messaging apps facilitate granular analysis.
- Manual review of conversations from start to finish often isn't feasible. Consider summarization technology, using AI to condense conversations down to key points. This will help you better classify the types of conversations and benefit agents.

Ask for feedback

End each engagement by inviting feedback. Summarization is a great tool, but customer feedback can be invaluable to capture.

Sending a customer satisfaction survey at the end of messaging conversations that includes some open-ended questions can be a good practice, too. These answers add depth to your quantitative data and provide context.

Measure your results

In this phase, you're trying to improve efficiency, reduce costs and boost agent productivity. Metrics should reflect the nature of asynchronous communication, which can go on for days. You can't measure the success of the interaction through a "time to resolution" metric; you need to rethink the way you measure efficiency.

Customer adoption rate is one way to measure this. Use summarization to get a sense of sentiment alongside surveys. In this way you can gather customer feedback to measure the experience itself, and capture input on their channel preferences. This is an easy way to gauge if you've chosen the right one.

Service KPIs

- Number of service inquiries resolved through messaging apps
- Reduced number of inquiries on other channels
- Shortened customer wait times on other channels
- Deflection from other higher-cost channels such as voice
- Customer satisfaction through surveys and conversation summarization

Sales and marketing KPIs

- Number of questions answered that resulted in a purchase
- Response rate to outbound marketing campaigns fulfilled through inbound messaging apps

Employee KPIs

- Number of engagements an agent handles during a specific time
- Agent response time (set clear SLAs)
- Agent satisfaction interacting on these channels — Listen to questions, issues and requests from agents to help improve the experience. For example, do they think using emojis, gifs or stickers to express emotions would help them connect with customers?

Checklist

Before you Run:

- Have your first messaging app up and running.
- Collect data from customer engagements.
- Put plans in place to promote the new channel.
- Train internal users on app capabilities and how to use them.
- Set policies for app ownership across business lines and transition engagement.
- Set up access to manage all your messaging apps from a single source or screen.
- Query employees on what's expected of them and their confidence levels using the app.
- Ensure quality control is in place and will be checked regularly.
- Identify measurements and establish benchmarks.

When you're deploying apps on the cloud, it's easy to spin out a new channel as soon as you're ready. You don't have to secure different vendors for each social app, and they're easily connected to the rest of your customer engagement platform.

Keep looking ahead.

Run

Orchestrate better journeys

47%

of consumers believe that offering
strong customer service makes a
brand best in class on social media

Social Media Trends for 2022 & Beyond, Sprout Social

Accelerate customer journeys and manage them

Once you're in the Run phase, you'll likely add other messaging channels and be able to handle more complex inquiries — with full context and customer history.

You'll also be able to pivot between channels mid-interaction. For example, if a user reaches out over one channel and you've identified this person as a "VIP customer" during the interaction, offer to escalate to a preferred channel such as a phone call.

Use case - Step 2

After messaging the brand on Facebook about the resort offer, Samantha was connected to an agent who gave her full details and informed her that she qualified for the discount.

However, Samantha preferred to research more vacation options first. Weeks later, she sees a thread on X where the resort is touting a brand-new restaurant located on site.

Curious, she messages the resort on X to ask how late the restaurant is open. A bot responds to this and a few other questions. Samantha then asks if the earlier offer she heard about includes the new restaurant. This escalates to a human agent who, after reviewing her prior conversation on Facebook, assures her it's included.

Get more customers on board

After you have one or multiple digital channels up and operational, consider how to increase customer adoption, prioritize more cost-effective digital channels, and determine your strategy for rolling out these channels.

You might do this on a cross-channel basis. For example, add an option to your IVR that offers a “no wait” option to connect over WhatsApp, Instagram, Facebook Messenger or other channels. This works by sending a text message to the phone number associated with the call and launching the new exchange over the selected channel.

If you plan for outbound messaging, you’ll need additional guidance. Because outbound messages typically are opt-in only, you’ll have to prompt customers and prospects to complete this step first. Give them a sense of what to expect and the benefits of opting in.

Pro tips

- Market the availability of the channel by putting it on your website “Contact Us” page.
- Invite customers to use the messaging app through your account on the social channel.
- Explore adding an option to your IVR that lets customers connect immediately on the app rather than waiting on hold.

Connect all your digital conversations

Blending your customer engagement channels lets you transition conversations across them. If you're chatting with a customer on a messaging app, that conversation can continue on other channels, including voice, where many complex issues and high-value customer calls escalate.

If you haven't done so already, connect your messaging to your CRM system. This is an especially powerful addition. Agents can ask for an email address (or other identifier) and bring up the customer's record while they're engaged in the conversation.

Once a customer has been identified, allow agents to tap into details about them. That includes relevant account information or purchases, and access to past conversations. Keep in mind that agents will be trying to engage quickly. Having a lot of information on a customer can also be a burden depending on its accessibility. Present this information in their workspace so they don't have to search through multiple systems for details.

Transcripts of past conversations can also be helpful, but sometimes too much for quick exchanges. This is where AI and summarization can help, letting them quickly identify key details or which conversation is relevant to their current chat.

Pro tip

Integrate messaging apps with your existing authentication provider to secure conversations for authenticated users. This is helpful when a customer wants to make a payment, for example.

Introduce bots and give them jobs

Bots are very effective at assessing and answering routine questions — and they do this faster than humans. Plus, many customers prefer not to engage with a human at all for simple questions. Let bots handle that first contact with customers via a messaging app and only engage human agents when it's necessary.

Even with bots on the front lines, don't lose out on gathering interaction insights. For example, you might have many inquiries focused on changing addresses rather than using the website to purchase products.

This is valuable data for planning website improvements and deciding which next steps to promote in future interactions. Use a system that gathers the most asked questions so you can see these trends.

Pro tip

Keep in mind: Customers and prospects will ask a bot many questions. And, occasionally, it'll be unable to give an adequate response. That should be expected, especially for newer bots.

Approach chatbots with optimization in mind because they'll get better over time. Just make sure that your processes and tools are in place to foster quick improvement.

Save time and money with self-learning bots

It's easy and secure to implement bots that operate using predefined rules. But that approach means bots can't learn in real time. If a customer asks a bot a question in a way that isn't part of a predefined rule, the bot must hand off to a human. Bots can't learn how language varies, which is required to recognize intent and personalize conversations.

Artificial intelligence (AI) bots are conversational and save a lot of time and money in the long run. Don't forget, though, the foundational knowledge that bots need. Assign resources for updating a knowledge base that's attached to the bot. Ideally, you'll have access to analytics and reports that highlight gaps in the bot's knowledge, so you can quickly optimize it. Update it with any business changes, too, such as a change in product pricing or updates to a specific feature.

Common bot use cases that save time

- Real-time queries: Account balances, store hours, location
- Processing transactions: Bill payments, product or service orders, guided technical support, satisfaction surveys
- Business processes: Update address, password reset, preference management, shipping updates, schedule callback
- Routing to another channel: Agent qualification; email, SMS, voice; routing to another bot

Measure your results

In the Run phase, KPIs focus on improving the experience for both the customer and the employee. Consider adding to the KPIs you identified in the Walk phase.

Service KPIs

- Net Promoter Score (NPS) is less about handling engagements and more about giving customers a seamless experience that doesn't require switching channels to resolve an issue
- Messaging containment rate determines if customers call in about the same topic after a certain number of days
- FCR, mean time to resolution, speed to issue resolution and level of effort needed for issue resolution

Sales and marketing KPIs

- Reduced abandon rates and an increase in sales
- Increase in lead generation and conversions

Employee KPIs

- Use employee surveys to measure engagement
- Ask for employee feedback on the effectiveness of self-service in reducing escalations
- Increase in number of positive interactions
- **Explore gamification** for measuring effectiveness

Checklist

Before you Fly:

- Establish benchmarks and share them with employees.
- Document new KPIs and make employees aware of them.
- Give employees access to customer data to better serve customers.
- Obtain a clear idea of the role messaging apps have in customer journeys and with other communication channels.
- Launch a chatbot on the app or begin exploring the options.
- Incorporate gamification or learn more about what it does.
- Adjust forecasting and scheduling, as needed.

At the end of the Run phase, agents:

- Grow more adept at managing different digital channels
- Are aware of their own productivity and understand more customer intents
- Rely on bots to do more front-end information gathering

Fly

Drive
performance
with empathy

40%

of CX leaders cited using data and
AI for customer understanding and
personalization as a top three priority

"The State of Customer Experience" Genesys, 2023

Serve customers fast with personalization and empathy

In the Fly phase, you're focused on what makes you more competitive. Today, that's all about making sure you're meeting your customers' expectations across digital exchanges. This means you'll take what you learned in the prior two phases and build on it with a focus on what customers feel leads to optimal CX experiences.

Use case – Step 2

After talking with the agent over X direct messages, Samantha booked a stay at the resort. Upon arrival, she learns about a special luau for this Saturday only. She wants to add this to her package without waiting in a long line to speak with a concierge. So, she sends an SMS text message.

This kicks off an automated bot exchange that concludes with a URL where she can complete her purchase. Samantha makes the payment, enjoying the quick process that allows her to get back to her vacation fast. In addition, the resort has automatically added Samantha's account to an "event" segment to personalize future communications.

Expand your knowledge and improve speed

Genesys surveyed over 5,000 customers for our “State of Customer Experience” report. One question asked customers what they value most in customer service interactions. The number one answer: Receiving a fast response.

Onboarding more digital channels can add complexity. Make sure this isn’t negatively impacting your response time because agents need to respond quickly to incoming inquiries. One way to address this proactively is to expand how you use knowledge. This was discussed briefly in the Run phase in relation to bots, but managing a knowledge base should be a goal.

Expand your use of knowledge beyond bots, such as in a self-service knowledge portal. Although this is a separate channel, it introduces a searchable article base for customers, reducing some support requirements.

Pro tips

- Offload your data for transformation

Once you recognize different formats of the same data from all your customer interactions and transform it into useable form, you’ll have insights that allow you to gain more from it. Use the output across products to drive fast personalized engagements at scale.

- Visualize your data for a clear picture

Displaying your information visually helps administrators consume and comprehend massive amounts of data. Identity resolution provides insights into individual customer journeys.

Genesys Agent Assist

To really increase your speed in the Fly phase, Genesys Agent Assist presents agents with relevant knowledge articles. Use these as canned responses or just to inform the agent. Let’s say an inquiry comes in via Facebook Messenger and the agent isn’t familiar with the topic. Rather than transferring the chat, AI can feed information to the agent directly, enabling them to respond to the inquiry and resolve it quickly.

Resolve problems faster with AI

In our “[State of Customer Experience](#)” report, getting a fast response was noted as most important to customers. First-interaction resolution was second.

AI-enabled agent routing plays a big role in addressing this. It uses machine learning that identifies patterns to match incoming inquiries with an optimal available agent. Patterns identify agents who deal most effectively with certain types of interactions. In this way, you can accelerate first-interaction resolutions whether it’s an SMS or X direct message.

Enable escalation on multiple channels

When escalating to a new channel for resolution to a problem, efficiency in doing so is a priority. Going to the phone is common, especially for high-profile clients. An asynchronous chat on your website could be another.

If escalation is the best choice, bring additional tools to the table, like launching a co-browse session, to help customers walk through their account. Or you might upload an image to better understand the issue. If you can’t achieve a first-interaction resolution, aim for a second-interaction resolution.

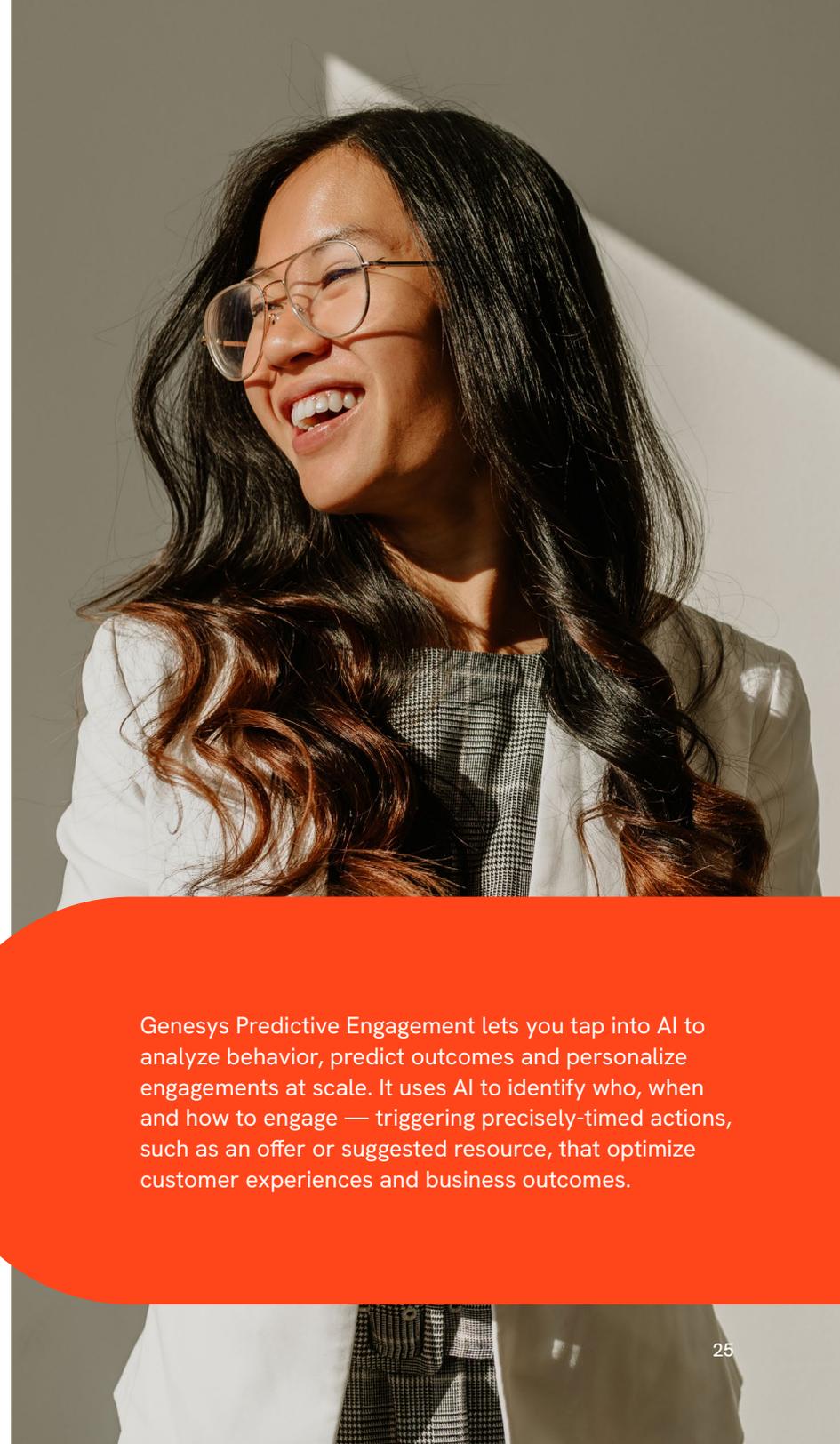
Genesys Predictive Routing works in real time, using AI to match customers to agents most likely to deliver the best customer experiences while optimizing for your most important KPIs. It analyzes hundreds of data points to detect patterns and predict outcomes.

Champion personalization

Personalized care drives more business, and those customers will recommend such a business to their friends and colleagues. In the “**State of Customer Experience**,” customers reported their top choice for personalization by a business means being able to deliver service at any time and through a channel of their choosing. By enabling SMS and messaging apps, you’re a long way toward achieving this.

Another element of personalization that ranked high was knowing and even predicting customer needs. AI has a major role in this, from support for automated pop-up offers to an instant connection with a human agent. Personalization can also mean tagging users into segments, showcasing interest in certain types of products or solutions that can be used for greater personalization (both automated and agent-led). These workflows incorporate AI elements, including the probability that a customer will achieve a desired business outcome through a result of these automated actions.

When you engage with customers at the right time, on the right channel, with the right information, empathy becomes the center of every conversation.



Genesys Predictive Engagement lets you tap into AI to analyze behavior, predict outcomes and personalize engagements at scale. It uses AI to identify who, when and how to engage — triggering precisely-timed actions, such as an offer or suggested resource, that optimize customer experiences and business outcomes.

Trigger meaningful engagement

While you might not have full visibility into your customer's activity on third-party messaging apps, you can still engage with empathy. Ensure your employees are ready and able to do this on any channel.

With the power of AI, your administrators have visibility into successful and unsuccessful customer journeys — and recommendations to improve future customer journeys. Your employees can act at the right time — with the right information. Make employees aware of engagement opportunities. Share a customer's entire engagement history, as well as the journey happening at that time. Recommend the next-best action for customers to take and enable your employees to engage customers through their preferred messaging app or on your website.

Tailor web experiences to the buyer

- Once a buyer moves from a messaging app to your website, shape the experience based on the likelihood of accomplishing the goal. Predictive web engagement AI determines when a user needs assistance and whether to initiate a conversation to close the deal.

Match customers and employees

- Connect customers with the right agent or information every time. Predictive routing AI considers customer preferences and matches each one with the agent who's most likely to deliver the best customer experience, boost revenue and improve KPIs.

Support your employees using AI

- Give employees the knowledge and resources they need to handle customer interactions with confidence. AI-powered agent assistance monitors conversations and gives your employees real-time recommendations and next-best actions.

Measure your results

In the Fly phase, you'll have measurement processes that allow you to continue improving KPIs you established during the Walk and Run phases. And you can understand the customer journey at a much more complex level, enabling you to create better experiences that feed customer loyalty and drive customer lifetime value. And with an approach that's fully customer- and employee-centric, you tie your success to business outcomes.

When you fully integrate data gathered from your messaging apps and other channels with AI services, you can proactively serve customers based on their journeys and attributes to engage. And this happens at scale along with the speed customers expect and in the moments it matters most.

“Genesys Predictive Engagement is enabling us to capture significantly more window shoppers on our website. Conversion rates rose by 14% in the first two weeks and by 49% at the six-week stage. And we’ve only really scratched the surface of what the tool can do.”

Getinet Tadesse
CIO, Ethiopian Airlines

Checklist

Now you're ready to further improve experiences and outcomes. Here are some ways to Fly even higher.

- Manage your knowledge base and expand how that knowledge is used to get more from your efforts.
- Continue drawing from past engagements to predict next-best steps with the highest confidence.
- Revise rules and criteria, as needed, for personalized engagement based on the mostly likely outcome.
- Reduce the number of points of failure in the customer journey and business operations as you develop your AI capabilities.
- Create new workflows around critical events or sets of actions as your business strategy evolves.
- Research, calculate and plan for future resource needs to meet efficiency goals.
- Review how to prioritize actions among desired business outcomes.

Once you Fly, you'll find more opportunities for growth and ways to show your customers you care about their experiences.

Conclusion

Put your prospects and customers in control and let them engage with your business whenever it's convenient for them. You'll strengthen connections by delivering empathy in all your interactions — and that creates loyalty.

When you build digital solutions on the Genesys Cloud™ platform, you're investing in a foundation for long-term alignment of customer service, employee and business outcomes. Its robust capabilities make SMS and messaging apps relatively easy to implement — and highly effective in meeting the goals you define.

Genesys Professional Services and our partners can guide you through part or all of the process. We have deep expertise in the Genesys deployments and capabilities needed to achieve your desired customer experience and employee experience goals.

**Connect all your
customer data for
insight you can act on**

Contact us today



About Genesys

Genesys empowers more than 8,000 organizations in over 100 countries to improve loyalty and business outcomes by creating the best experiences for customers and employees. Through Genesys Cloud, the #1 AI-powered experience orchestration platform, Genesys delivers the future of CX to organizations of all sizes so they can provide empathetic, personalized experience at scale. As the trusted, all-in-one platform born in the cloud, Genesys Cloud accelerates growth for organizations by enabling them to differentiate with the right customer experience at the right time, while driving stronger workforce engagement, efficiency and operational improvements.

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