

**Making Everything Easier!™**

# **Mobile Marketing** **FOR** **DUMMIES®**

## **Learn to:**

- **Understand the mobile world and mobile marketing best practices**
- **Plan your mobile marketing strategy**
- **Launch a campaign including voice, text, e-mail, and social media**
- **Mobile-enable your marketing and establish direct customer contact**

**Michael Becker**  
**John Arnold**

*Coauthors of Web Marketing All-in-One  
For Dummies*

[www.it-ebooks.info](http://www.it-ebooks.info)



# Get More and Do More at Dummies.com®



Start with **FREE** Cheat Sheets

Cheat Sheets include

- Checklists
- Charts
- Common Instructions
- And Other Good Stuff!

To access the Cheat Sheet created specifically for this book, go to  
***[www.dummies.com/cheatsheet/mobilemarketing](http://www.dummies.com/cheatsheet/mobilemarketing)***

## Get Smart at Dummies.com

Dummies.com makes your life easier with 1,000s of answers on everything from removing wallpaper to using the latest version of Windows.

Check out our

- Videos
- Illustrated Articles
- Step-by-Step Instructions

Plus, each month you can win valuable prizes by entering our Dummies.com sweepstakes.\*

Want a weekly dose of Dummies? Sign up for Newsletters on

- Digital Photography
- Microsoft Windows & Office
- Personal Finance & Investing
- Health & Wellness
- Computing, iPods & Cell Phones
- eBay
- Internet
- Food, Home & Garden

## Find out "HOW" at Dummies.com

\*Sweepstakes not currently available in all countries; visit Dummies.com for official rules.

[www.it-ebooks.info](http://www.it-ebooks.info)



# ***Mobile Marketing*** FOR **DUMMIES®**

**by Michael Becker and John Arnold**



WILEY

Wiley Publishing, Inc.

## Mobile Marketing For Dummies®

Published by

**Wiley Publishing, Inc.**

111 River Street

Hoboken, NJ 07030-5774

[www.wiley.com](http://www.wiley.com)

Copyright © 2010 by Wiley Publishing, Inc., Indianapolis, Indiana

Published by Wiley Publishing, Inc., Indianapolis, Indiana

Published simultaneously in Canada

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without either the prior written permission of the Publisher, or authorization through payment of the appropriate per-copy fee to the Copyright Clearance Center, 222 Rosewood Drive, Danvers, MA 01923, (978) 750-8400, fax (978) 646-8600. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

**Trademarks:** Wiley, the Wiley Publishing logo, For Dummies, the Dummies Man logo, A Reference for the Rest of Us!, The Dummies Way, Dummies Daily, The Fun and Easy Way, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates in the United States and other countries, and may not be used without written permission. All other trademarks are the property of their respective owners. Wiley Publishing, Inc., is not associated with any product or vendor mentioned in this book.

**LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER AND THE AUTHOR MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEBSITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.**

For general information on our other products and services, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002.

For technical support, please visit [www.wiley.com/techsupport](http://www.wiley.com/techsupport).

Wiley also publishes its books in a variety of electronic formats. Some content that appears in print may not be available in electronic books.

Library of Congress Control Number: 2010935570

ISBN: 978-0-470-61668-0

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1



WILEY

# About the Authors

**Michael Becker** is the North American managing director for the Mobile Marketing Association and a leader in the mobile marketing industry, assuming the roles of industry entrepreneur, volunteer, and academic. He is also the founder and vice president of strategy at iLoop Mobile, an industry-leading mobile marketing solutions provider.

Michael served on the MMA Global Board of Directors (2008, director at large; 2009, global board vice chair) and served on the MMA North American board of directors (2004, 2005, 2007, 2008, and 2009). He founded and co-chaired both the award-winning MMA Academic Outreach Committee and the *MMA International Journal of Mobile Marketing*. He is also a member of the Direct Marketing Association's annual programming advisory and mobile councils.

In addition to his industry and volunteer roles, Michael is a contributing author to *Mobile Internet For Dummies*, *Social Media Marketing For Dummies*, *Reinventing Interactive and Direct Marketing*, is a co-author of *Web Marketing All-in-One Desk Reference For Dummies*, and this book, *Mobile Marketing For Dummies*. He has authored more than 60 articles on mobile marketing and is an accomplished public speaker on the topic.

In his spare time, Michael is pursuing his doctorate on the topic of mobile-enhanced customer managed interactions and vendor relationship management at Golden Gate University. Michael was awarded the MMA Individual Achievement Award in 2007 and the Direct Marketing Educational Foundation Rising Stars Award in 2009 for contributions to the mobile and direct marketing industries.

**John Arnold** is a leading marketing expert, author, and speaker specializing in marketing advice for small businesses, franchises, associations, and organizations. John writes the "Marketing Tools & Technologies" column for *Entrepreneur Magazine* and he is the author of several marketing books, including *Web Marketing All-in-One Desk Reference For Dummies*, *E-Mail Marketing For Dummies*, and this book, *Mobile Marketing For Dummies*.

John is also a highly regarded marketing technology trainer who knows how to deliver solid takeaways that people can implement in their business or organization right away. His no-hype and highly practical approach cuts through the clutter as he explains the most useful marketing strategies, technologies, and tactics with clarity, artful simplicity, and meaningful application.

To inquire about John being a marketing speaker, trainer, or consultant for your small business, franchise, association, or organization, visit [www.johnarnold.com](http://www.johnarnold.com).

# Dedication

**Michael Becker:** I dedicate this book to my family. They keep me focused on what is important. I also dedicate it to all those looking to establish and nurture a flourishing, intimate, and integrative relationship through and with the new and exciting medium of mobile.

**John Arnold:** I dedicate this book to the individual entrepreneurs who love the spirit of free enterprise and who live to share their personal passions with their customers and their communities, and to the One who causes all things to work together for good.

# Authors' Acknowledgments

**Michael Becker:** I would first like to thank my family. Their encouragement and support as I pursue my dreams is invaluable to me.

I would also like to thank John Arnold. Without John's encouragement, focus, expertise, direct contributions, time management and editing skills, this book would have never seen the light of day. John is simply amazing.

Thanks to the outstanding team at Wiley Publishing, including Steve Hayes, Leah Cameron, and Linda Morris, and to Jennifer Hatherley for filling the role of technical editor for the manuscript.

Finally, I send thanks to everyone at iLoop Mobile, the Mobile Marketing Association, the Direct Marketing Association, the Internet Advertising Bureau, my partners and competitors, and all my colleagues within the mobile marketing industry. Your encouragement, support, and fellowship contributes to the advancement of this wonderful industry — mobile marketing.

**John Arnold** would first like to thank my wife and kids for encouraging me while working on multiple projects at a time. You guys are the best family anyone could hope for.

Next, I would like to thank Michael Becker for his passion for mobile marketing and for sharing his knowledge not only in this book, but in the hundreds of speaking engagements, consultations, meetings, articles, whitepapers, text books, and conversations he contributes to annually.

Thanks to Matt Wagner for running an ideal literary agency. None of my books would have been possible without his experience and guidance.

Special thanks to the super team of professionals at Wiley Publishing. I'd like to thank Steve Hayes for his patience in dealing with contracts. I would also like to thank Leah Cameron and Linda Morris for editing the manuscript, asking tough questions, and for patiently understanding our definition of the word *deadline*. Thanks also to our technical editor, Jennifer Hatherley.

# *Contributing Authors*

When we started this project, we decided early on that no book about mobile marketing should be written by a single author because too many things are rapidly changing and emerging for one person to know everything.

To complete this book, we relied on the contributions of numerous leaders in the marketing industry. Each of them has shared their unique prospective and personal mobile marketing expertise.

The following contributors were instrumental in the development and authority of the material in this book. Our thanks and admiration goes out to each of them because they added a great deal of experience and value to the pages by writing and submitting many ideas, examples, and details that we may have otherwise overlooked. They are listed in alphabetical order.

**Douglas Busk, executive vice president, mobile strategy and business development, Whoop:** Doug holds more than a decade of mobile marketing and product development expertise. From leading text messaging at Verizon Wireless to advising the 2008 Barack Obama presidential campaign on its landmark mobile marketing efforts, if it can be done in wireless, Doug has done it. A dedicated proponent of not only the industry's powerful marketing capabilities, but its charitable possibilities as well, Doug helped lead the industry in the creation of non-profit giving via text messaging to benefit those impacted by Hurricane Katrina. In his "free" time, Doug has been an active participant in multiple industry groups, including the Mobile Marketing Association, dotMOBI, CTIA, and others. He is currently based in Atlanta, where he leads business development and mobile strategy for Whoop ([www.whoop.com](http://www.whoop.com)), which supplies a design platform for the creation of smartphone applications.

**James Citron, president and CEO of Mogreet:** James is the visionary behind the mobile industry's leading platform for the delivery of mobile video. When he isn't waxing poetic about mobile video, MMS, or the iPad, James is running one of the leading mobile marketing companies in the country. James has spent the last 10 years in the mobile industry, as both an analyst advising on telecommunications mergers and acquisitions and as an operator launching mobile products and businesses in more than twenty countries. Mr. Citron is a graduate of Princeton University. His Twitter name is @jamescitron.

**Ben Gaddis, director, mobile and emerging media, T3:** Ben Gaddis is director of mobile and emerging media strategy at T3, where he leads the agency's mobile offering and develops emerging applications and media strategies for T3's clients. With almost ten years of experience focused on technology in advertising, Ben has developed mobile strategies and programs for AT&T, Frito-Lay, Nokia, and American Airlines.

**Eric Holmen, senior vice president, business development and marketing, The Marketing Arm, Wireless Practice:** Eric lost, destroyed, or wore out more mobile phones last year than most of us will ever own. While president of the mobile marketing company SmartReply, he acquired a mobile ad network and launched a mobile payment system for retail, while building one of the largest mobile marketing companies in North America. At The Marketing Arm, Eric brings a big vision of mobile as the new reality of multi-channel marketing and advertising for the Fortune 100 set. “This kind of job means you gotta know your devices, carriers, benefits, and potential, which means carrying around a lot of mobile devices.” His pedigree includes Catalina Marketing and Sears, and is a grad of M.I.T. and the University of Redlands. He has three unwired kids and an Ironman wife. On weekends, you’ll find him busily dropping phones over the side of his sailboat into the Pacific waters off southern California (where he peacefully gets zero bars).

**Gabe Karp, executive vice president and general counsel of ePrize, LLC:** Gabe oversees the legal services, fulfillment, and human resources teams at ePrize. He has overseen more than 5,000 interactive promotional campaigns in 36 countries with no legal challenges. These campaigns include online and mobile-based loyalty programs, prize drawings, instant win games, skill based contests, and so on. Gabe is a respected authority and frequent speaker and writer on legal issues surrounding interactive promotions, including mobile marketing, user-generated content, social networking, and emerging technologies. He assisted in revising Puerto Rico’s sweepstakes regulations adopted in 2009, has consulted the Federal Trade Commission regarding CAN-SPAM regulations, and helped legislators and regulators from several states draft and enforce legislation in those jurisdictions applicable to the interactive promotion industry.

**Jeannette Kocsis, senior vice president of digital marketing for Harte-Hanks, Inc.:** Jeannette is a digital marketing expert, having started with search engine optimization in 1997, owned and operated an e-commerce site, and, in 1999, owned a community Web site with more than 100,000 regular monthly visitors. Today, Jeannette is senior vice president of digital marketing for Harte-Hanks, Inc. Working at the Agency Inside Harte-Hanks, she oversees strategy and media across all vertical markets and is responsible for bringing new trends like mobile and social into client strategies. Jeannette is a frequent speaker on mobile and social media, and she is published on a regular basis. Jeannette was named to the Mobile Women to Watch for 2010 list by *Mobile Marketer*. At the time of this writing, Jeannette has a variety of mobile devices, including an iPhone, an iPod, and a Blackberry (for work). Jeannette lives in the Hudson Valley of New York State, with her family and their Great Dane.

**Christian Loredó, mobile guru:** Christian eats, sleeps, and breathes mobile! He has had experience with both large companies and small, wireless carriers and startups. Christian enjoys watching the mobile world develop and advance, helping companies mobilize their mission statements, and trying



to stay a couple steps ahead of consumer experiences for enhancing their interactions with mobile devices, applications, and brands. Christian also is passionate about extreme sports and is an expert snowboarder, mountain biker, and is amped about his latest sport, kite-surfing! His dream is to go heli-skiing, and show all his friends (especially those who couldn't make it!) how incredible it is . . . as they're all dialed in via mobile! Text CML to 44265 for his personal contact info.

**Erin (Mack) McKelvey, senior vice president of marketing, Millennial Media:**

Erin (Mack) McKelvey leads all areas of Millennial Media's corporate and product marketing, external communications, and industry relations. She also serves as the company spokesperson. Mack has more than thirteen years of business-to-business and consumer marketing and communications experience in the entertainment and mobile industries. She is an active member of the Mobile Advertising and the Women in Wireless Committees within the Mobile Marketing Association (MMA), and is an active member of the Mobile Advertising and the Networks and Exchanges Committees within the Interactive Advertising Bureau (IAB). Mack is a frequent industry speaker, and she was recently named one of the 2010 Mobile Women to Watch, by *Mobile Marketer*. She has also served as an awards judge and as an advisory board member to numerous industry conferences and events.

**Kerry Nagle, vice president of campaign operations, Millennial Media:**

Kerry Nagle joined Millennial Media as one of its founding members. With an extensive background in advertising, including online, remarketing, and performance analysis, she leads the advertiser and publisher-side analytics and process teams. Kerry is responsible for delivering a large number of key company priorities including campaign execution, ROI maximization, and inventory monetization. She has been integral in executing first-to-market products, determining the viability of new products and their relevance to the mobile marketplace and advertisers. Currently, Kerry is an active member of the IAB and MMA. Driving best practices, Kerry is committed to sustaining innovation through Millennial Media and the mobile advertising industry.

**Jeffrey J Russell, mobile product manager:** Jeff loves to create and deliver mobile products for the U.S. and emerging markets. Many of these products are mature consumer and mobile platform products for large U.S. and international companies such as Microsoft, Apple, VeriSign, Sprint, Verizon Wireless, Vodaphone, and AT&T. Some of the more interesting products have been off-beat. Jeff created mobile product that used Japanese-style anime to teach Japanese/urban English. The concept and artwork was put on display at the Visionarium in Santa Maria da Feira, Portugal. In Cebu, Philippines, he created a three-screen social network product tying a commercial Web site, mobile voting, and television programming together. Jeff's life goal list is still huge and it includes ice diving under the Antarctica ice shelf, traversing the length of the Congo, and climbing some flat-topped mountains in Venezuela. Jeff continues to pull life and mobile inspiration from his son, Greyson.

## **Publisher's Acknowledgments**

We're proud of this book; please send us your comments at <http://dummies.custhelp.com>. For other comments, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002.

Some of the people who helped bring this book to market include the following:

### ***Acquisitions and Editorial***

**Project Editor:** Linda Morris

**Acquisitions Editor:** Steven Hayes

**Copy Editor:** Linda Morris

**Technical Editor:** Jennifer Hatherley

**Editorial Manager:** Jodi Jensen

**Editorial Assistant:** Amanda Graham

**Sr. Editorial Assistant:** Cherie Case

**Cartoons:** Rich Tennant  
([www.the5thwave.com](http://www.the5thwave.com))

### ***Composition Services***

**Project Coordinator:** Katherine Crocker

**Layout and Graphics:** Kelly Kijovsky,  
Christine Williams

**Proofreaders:** Melissa Cossell, Penny Stuart

**Indexer:** Ty Koontz

---

## **Publishing and Editorial for Technology Dummies**

**Richard Swadley**, Vice President and Executive Group Publisher

**Andy Cummings**, Vice President and Publisher

**Mary Bednarek**, Executive Acquisitions Director

**Mary C. Corder**, Editorial Director

## **Publishing for Consumer Dummies**

**Diane Graves Steele**, Vice President and Publisher

## **Composition Services**

**Debbie Stailey**, Director of Composition Services

# Contents at a Glance

---

<b><i>Introduction .....</i></b>	<b><i>1</i></b>
<b><i>Part I: Getting Up to Speed on Mobile Marketing .....</i></b>	<b><i>7</i></b>
Chapter 1: Unveiling the Possibilities of Mobile Marketing .....	9
Chapter 2: Mapping Out Your Mobile Marketing Strategy .....	31
Chapter 3: Complying with Industry Regulations and Best Practices .....	57
<b><i>Part II: Executing Direct Mobile Marketing Campaigns...</i></b>	<b><i>77</i></b>
Chapter 4: Getting Ready for a Text Messaging Campaign .....	79
Chapter 5: Executing Common Text Messaging Campaigns .....	105
Chapter 6: Sending Multimedia Messages .....	135
Chapter 7: Mobile E-Mail Marketing .....	149
<b><i>Part III: Mobile Media, Publishing, and Advertising...</i></b>	<b><i>179</i></b>
Chapter 8: Designing and Developing Mobile Internet Sites .....	181
Chapter 9: Developing Mobile Applications and Content .....	203
Chapter 10: Displaying Your Advertising on Mobile Devices .....	221
Chapter 11: Executing Voice-Enabled Mobile Campaigns .....	247
Chapter 12: Mobile Social Media Marketing .....	263
<b><i>Part IV: Mobile Commerce and Analytics.....</i></b>	<b><i>279</i></b>
Chapter 13: Engaging in Mobile Commerce.....	281
Chapter 14: Evaluating the ROI on Mobile Marketing .....	301
<b><i>Part V: The Part of Tens .....</i></b>	<b><i>323</i></b>
Chapter 15: Ten Ways to Reach Your Customers on Their Mobile Devices .....	325
Chapter 16: Ten Mobile Marketing Resources .....	329
<b><i>Glossary.....</i></b>	<b><i>335</i></b>
<b><i>Index .....</i></b>	<b><i>347</i></b>



# Table of Contents

## ***Introduction ..... 1***

About This Book .....	2
Conventions Used in This Book.....	2
Foolish Assumptions.....	3
How This Book Is Organized .....	3
Part I: Getting Up to Speed on Mobile Marketing .....	3
Part II: Executing Direct Mobile Marketing Campaigns.....	3
Part III: Mobile Media, Publishing, and Advertising .....	4
Part IV: Mobile Commerce and Analytics .....	4
Part V: The Part of Tens .....	4
Icons Used in This Book .....	4
Where to Go from Here.....	5

## ***Part I: Getting Up to Speed on Mobile Marketing..... 7***

### **Chapter 1: Unveiling the Possibilities of Mobile Marketing . . . . . 9**

Defining Mobile Marketing .....	10
Examining the five elements of mobile marketing.....	10
Identifying mobile consumers.....	11
Exploring the types of mobile devices .....	12
Getting to know mobile networks: The basics .....	15
Getting Your Bearings on the Three Forms of Mobile Marketing .....	16
Direct mobile marketing .....	16
Mobile-enabled traditional and digital media marketing.....	17
Mobile-enabled products and services.....	18
Getting the Most Out of Mobile Devices.....	18
Dialing and pressing .....	18
Texting.....	19
Snapping and scanning .....	19
Submitting.....	20
Using star and pound .....	20
Finding the way with location .....	20
Ticketing and identification with NFC and RFID .....	21
Discovering Available Mobile Paths and Capabilities .....	22
Defining text messaging (SMS).....	22
Making it rich with multimedia messaging (MMS) .....	25
Mobilizing your e-mail.....	25

Humanizing your message with voice.....	26
Reaching people on the mobile Internet.....	26
Engaging consumers with applications and downloads.....	27
Making connections through proximity paths:	
Bluetooth and Wi-Fi .....	28
All hands on deck: Manning your portals.....	29
Advertising on the small screen .....	29
Cashing in on mobile commerce.....	30

## **Chapter 2: Mapping Out Your Mobile Marketing Strategy . . . . . 31**

Adding a Mobile Strategy to Your Marketing Plan .....	32
Harnessing information and experience.....	33
Identifying seven key components of a mobile marketing plan ....	34
Managing the customer journey .....	34
Designing your mobile tools based on	
a variety of device features.....	37
Choosing an approach for getting it done.....	38
Including Mobile Service Providers in Your Strategy .....	39
Understanding the Costs of Mobile Marketing .....	44
Calculating upfront mobile marketing costs .....	44
Variable mobile marketing costs .....	45
Basing Your Strategy on Your Mobile Reach.....	46
Dealing with interoperability.....	46
Standing up to standards.....	47
Adapting to mobile phone adoption .....	47
Figuring on feature adoption.....	49
Evaluating ecosystem efficiencies .....	49
Profiling your customer .....	49
Reaching for geography .....	50
Determining the applicability of your strategy .....	50
Including Customer Analysis in Your Strategy .....	53
Demographic factors that affect your strategy.....	53
Psychographic factors that affect your strategy .....	54
Aligning your strategy to preferences.....	54
Planning for situational context.....	55

## **Chapter 3: Complying with Industry Regulations and Best Practices . . . . . 57**

Creating Your Company's Mobile Marketing Policy .....	58
Adopting a code of conduct .....	58
Publishing your privacy policy .....	60
Stating your permission practices.....	61
Securing and managing consumer data.....	63
Creating policies for special programs .....	65

Complying with Trade Association Guidelines.....	66
Getting to know the influencers .....	66
Embracing industry self-regulation .....	68
Complying with U.S. Government Regulations .....	69
Steering clear of mobile spam.....	69
Regulations governing automated voice campaigns.....	71
Safeguarding the privacy of children .....	73
Complying with sweepstakes rules .....	74
Complying with Non-U.S. Government Regulations .....	75

## ***Part II: Executing Direct Mobile Marketing Campaigns... 77***

### **Chapter 4: Getting Ready for a Text Messaging Campaign . . . . . 79**

Understanding SMS Basics .....	80
Understanding the flow of text messaging .....	80
Creating user-flow diagrams .....	82
Getting Approval for Your Text Messaging Campaigns.....	87
First-time CSC and campaign certification .....	88
Re-certifying and getting updates .....	90
Auditing programs and maintaining compliance.....	90
Understanding Common Short Codes .....	90
Acquiring a common short code .....	92
Deciding what type of CSC to use.....	94
Going dedicated or shared .....	95
Choosing an SMS Application Platform .....	96
Understanding SMS application platform capabilities.....	97
Selecting your SMS provider .....	98
Setting Up Your SMS Database .....	100
Creating consumer profiles .....	101
Collecting data automatically through SMS .....	102
Collecting data manually through SMS.....	102
Accessing your mobile marketing data.....	103
Integrating SMS data with your CRM.....	104

### **Chapter 5: Executing Common Text Messaging Campaigns . . . . . 105**

Getting Permission: The Opt-In.....	106
Placing an opt-in call to action in media.....	106
Collecting mobile-originated opt-ins .....	107
Collecting opt-in through the Internet and applications .....	109
Collecting opt-ins through snapping and scanning.....	109
Collecting opt-ins through dialing and pressing.....	111
Gracefully Saying Goodbye: The Opt-Out.....	112

Sending Information and Alerts via SMS.....	113
Scheduling and sending SMS information .....	113
Sending filtered and automated SMS alerts.....	114
Following best practices for SMS timing and content.....	116
Engaging with Mobile Coupons .....	116
Setting up your couponing program .....	117
Setting up coupon redemption at a point of sale .....	118
Setting up Internet and application coupon redemption .....	122
Offering incentives: Gifts, freebies, and samples.....	123
Managing prize promos, contests, and giveaways .....	124
Offering Quizzes and Trivia.....	125
Setting up quiz options .....	126
Setting up quiz response options .....	127
Capturing Sentiment with Polling and Surveys .....	130
Planning the survey .....	131
Using open-ended questions .....	131
Setting survey options .....	132
Choosing a poll type.....	132
Setting poll options.....	133
Discovering Text-to-Screen and Experiential SMS Campaigns .....	133
<b>Chapter 6: Sending Multimedia Messages .....</b>	<b>135</b>
Comparing MMS to SMS.....	135
Discovering the content capabilities of MMS.....	136
Examining MMS compatibility and reach .....	137
Preparing Your MMS Campaign.....	138
Putting your MMS storyboard together.....	139
Collecting and formatting your media .....	140
Delivering your MMS content.....	141
Sending Common MMS Campaigns .....	144
Sending MMS greeting cards .....	144
Running picture-to-screen campaigns.....	145
Creating MMS coupon promotions.....	147
<b>Chapter 7: Mobile E-Mail Marketing .....</b>	<b>149</b>
Getting a Grip on Mobile E-Mail .....	150
Dealing with devices and browsers.....	153
Choosing an e-mail marketing provider (EMP).....	157
Collecting E-Mail Addresses through Mobile Devices .....	160
Texting in an e-mail address.....	160
Providing forms on mobile Web sites .....	161
Capturing addresses through mobile e-mail .....	162
Using mobile applications to collect e-mail addresses.....	162



Building and Sending a Mobile E-Mail Campaign .....	164
Choosing a mobile e-mail design approach.....	165
Creating a mobile-friendly e-mail design .....	166
Adding navigation links to mobile e-mails.....	168
Writing mobile e-mail content.....	172
Including mobile calls to action in your e-mails .....	176

## ***Part III: Mobile Media, Publishing, and Advertising.... 179***

### **Chapter 8: Designing and Developing Mobile Internet Sites. .... 181**

Understanding the Mobile Web .....	182
Putting your mobile site in the right context.....	182
Keeping your focus on the experience.....	183
Designing for multiple devices.....	186
Considering the Purpose of Your Mobile Site.....	188
Identifying the needs of your mobile audience.....	188
Choosing from three types of mobile Internet sites.....	189
Choosing a Mobile Internet Domain Strategy .....	190
Designing and Building Your Mobile Site .....	193
Default site.....	194
Medium site .....	194
High-end site.....	194
Choosing tools to build your mobile site .....	195
Using Web-standard code for your mobile site .....	196
Giving your mobile site good design features.....	197
Creating Mobile Site Content .....	199
Testing your mobile site content.....	201
Updating your mobile site content.....	201

### **Chapter 9: Developing Mobile Applications and Content ..... 203**

Choosing a Mobile Application Strategy .....	204
Deciding whether a mobile app is the best choice .....	204
Choosing which devices to design for .....	206
Choosing a Method for Developing Your Application .....	207
Going with in-house development .....	208
Leveraging outside consultants, agencies and partners .....	210
Following Best Practices for Designing Applications .....	211
Employing the utility of the touchscreen .....	211
Designing for a platform and hardware .....	212
Distributing Mobile Applications .....	212
Publishing to device app stores.....	212
Going on-deck with carrier catalogs.....	214
Marketing via direct download .....	215

Creating and Distributing Mobile Content .....	215
Providing branded wallpapers and screen savers .....	216
Delivering ringtones and other system sounds .....	218

## **Chapter 10: Displaying Your Advertising on Mobile Devices . . . . .221**

Squeezing the Advantages Out of Mobile Advertising.....	222
Leveraging Different Types of Mobile Advertising.....	223
Using multiple ad units and placements.....	224
Placing ads in mobile search.....	225
Grasping the Basics of Buying and Selling Mobile Advertisements.....	227
Partnering with media agencies.....	228
Working with mobile advertising networks .....	230
Buying ads directly from publishers .....	233
Advertising with mobile carriers .....	235
Paying publishers and billing buyers for mobile ads.....	235
Getting a Return on Your Mobile Ad Buying.....	236
Choosing targets and formats for your mobile ads.....	237
Creating ads for mobile properties .....	238
Inviting action on your mobile ads.....	238
Placing Ads in Your Own Mobile Properties.....	242
Placing ads on your own mobile site.....	243
Advertising in applications and downloadable content .....	245

## **Chapter 11: Executing Voice-Enabled Mobile Campaigns . . . . .247**

Choosing an Approach to Mobile Marketing with Voice.....	248
Choosing a live agent approach.....	248
Choosing an interactive voice response (IVR) approach.....	250
Finding a voice services provider.....	251
Setting Up IVR Programs .....	252
Planning your campaign .....	252
Scripting the interaction .....	253
Recording IVR audio prompts.....	256
Configuring and preparing program responses.....	256
Executing Different Kinds of Voice Campaigns.....	258
Plain old dialing.....	259
Click-to-call .....	259
Text-to-voice.....	260
Callback and live chat .....	262
Voice broadcast .....	262

## **Chapter 12: Mobile Social Media Marketing . . . . .263**

Integrating Mobile with Your Social Media Strategy.....	263
Identifying mobile communities and social networks .....	264
Creating your own mobile communities.....	268

Engaging with Mobile Social Media Users .....	270
Encouraging people to join your community via mobile.....	271
Enabling mobile social media interactions.....	273
Listening and responding to social sharing .....	274
Engaging with pictures, videos, and other media .....	277

## ***Part IV: Mobile Commerce and Analytics ..... 279***

### **Chapter 13: Engaging in Mobile Commerce .....281**

Deciding Where to Sell Your Stuff .....	281
Setting Up Your Mobile Billing Infrastructure .....	282
Setting up a merchant account .....	283
Setting up mobile billing systems and accounts .....	283
Making It Easy for Customers to Pay by Mobile.....	286
Selling Content through Carrier Portals .....	288
Developing a direct relationship with carriers .....	288
Entering into a channel relationship .....	289
Contracting with an intermediary company .....	290
Collecting Payment through Carrier Billing:	
PSMS and the Mobile Web .....	290
Billing with premium SMS (PSMS) .....	291
Understanding premium messaging payout .....	294
Reconciling PSMS reports.....	294
Carrier billing via the mobile Web.....	296
Leveraging the Mobile Wallet .....	297
Accepting mobile integrated payments .....	298
Offering mobile loyalty programs.....	299
Selling mobile gift cards .....	300

### **Chapter 14: Evaluating the ROI on Mobile Marketing .....301**

Determining What to Track and Analyze.....	302
Preparing Your Database to Collect Information .....	304
Outlining demographic data.....	306
Organizing psychographic data.....	306
Planning for preferences data .....	307
Planning for behavioral data .....	307
Looking out for location data .....	308
Mining syndicated data.....	308
Populating a Mobile Database .....	309
Collecting data through SMS .....	309
Collecting through the mobile Internet	
and installed applications .....	310
Integrating CRM with mobile campaigns .....	311

Tracking Interactions: Clicks, Calls, Votes, and More ..... 312

    Using third-party tracking tools..... 312

    Obtaining metrics from partners and service providers..... 314

    Understanding analytics reports ..... 315

Calculating Your Return on Mobile Marketing Investment..... 318

    Calculating expected ROMMI for direct revenue programs..... 319

    Calculating expected ROMMI for indirect revenue programs ..... 321

***Part V: The Part of Tens ..... 323***

**Chapter 15: Ten Ways to Reach Your Customers  
on Their Mobile Devices. .... 325**

Text Messaging (SMS)..... 325

Multimedia Messaging Service (MMS)..... 326

Mobile E-Mail..... 326

Mobile Internet Sites ..... 326

Mobile Applications ..... 326

Interactive Voice Response (IVR)..... 327

Mobile Social Media ..... 327

Mobile Advertising ..... 327

Mobile Commerce and Location-Based Enabled Engagements..... 328

Mobile-Enabled Traditional Media ..... 328

**Chapter 16: Ten Mobile Marketing Resources ..... 329**

The Mobile Marketing Association (MMA) ..... 329

dotMobi..... 330

The Common Short Code Administration (CSCA) ..... 330

Mobile Testing Services..... 331

The Wireless Telecommunications Bureau (WTB)..... 331

Mobile Marketer and Other Reference Sites ..... 332

The Direct Marketing Association (DMA) ..... 333

CTIA: The Wireless Association..... 333

MyWireless.org ..... 334

The Netsize Guide..... 334

***Glossary ..... 335***

***Index ..... 347***

# Introduction

---

**M**arketers are always looking to make their communications more personal, more targeted, and more relevant. Mobile is arguably the most personal, targeted, and relevant marketing channel available.

Mobile devices provide individuals with almost instant access to friends and family, location-based information, productivity tools, entertainment, and all the benefits of accessing the Internet from almost anywhere. If you're responsible for marketing a business or organization, making sure your marketing campaigns find their way on to mobile devices is one of the most important jobs you have.

This book shows you how to create and run engaging mobile marketing campaigns using today's mobile technology. We explain the opportunities and strategies you need to reach mobile consumers and get them to engage. We show you how to deliver mobile messages including SMS, MMS, and mobile e-mail.

Because your prospects and customers have to opt in for you to deliver mobile messages to them, this book explains how to build a quality mobile opt-in list full of subscribers who reward your mobile marketing efforts. We also show you how to create great mobile Internet sites, mobile applications, advertising campaigns, and social media interactions.

This book also shows you how to take advantage of voice by creating voice campaigns and how to enable your customers to make purchases on their phones through mobile commerce and point-of-sale campaigns.

Mobile marketers are subject to many legal requirements and industry guidelines, and many mobile marketing campaigns require carrier approval. This book shows you how to adhere to professional standards, follow the rules, and get through the processes involved in setting up your campaigns.

Mobile marketing has the ability to provide you with all kinds of great data on your customers and prospects, including their location data, so we include tips and ideas for using mobile tracking reports and analytics to improve your strategy and increase your sales.

Mobile technology is emerging and developing all the time, and new ways of marketing are adapting all the time too. The best time to start marketing through the mobile channel is today. Get ready, get set, go for it!

## About This Book

*Mobile Marketing For Dummies* is written to answer your questions about mobile marketing and to give you tips and ideas for executing the various steps involved in a successful mobile marketing campaign.

This book isn't written to impress technically savvy pocket-protector types. It's for marketers and business owners who have to make the most of every minute of every day. We include lots of bulleted text with concise descriptions and ideas for implementing each topic immediately.

The content in each chapter stands alone, so you don't have to read all the chapters in order. You can use this book like an entire series of books on the subject of mobile marketing. You can scan through the Table of Contents and read about a single topic to refresh your memory or to get a few ideas before beginning a task, or you can read an entire chapter or a series of chapters to gain understanding and gather ideas for executing one or more parts of an entire mobile marketing campaign.

Sidebars are included in this book as interesting additional tidbits or to give anecdotal examples of the tips and ideas in the book. You don't have to read them to benefit from this book.

## Conventions Used in This Book

To make this book easier to scan and internalize, we use the following conventions:

- ✓ Words in *italics* are used to point out industry terminology or words that have special definitions in the book.
- ✓ Words in **bold** represent the keyword or the main idea in bulleted lists.
- ✓ Web addresses and snippets of programming code appear in a different font, as in `www.MobileMarketingForDummies.com`.
- ✓ Placeholder text in code is in italic, as in `<a href="http://www.yourwebsite.com/page.html#anchorname">`, where *yourwebsite* should be replaced with the actual name of your Web site.

## ***Foolish Assumptions***

It's hard to imagine that anyone has managed to stay completely away from mobile phones. However, to get the most out of this book, we assume that you already

- ✓ Are familiar with the basic functions of a mobile phone
- ✓ Are responsible for (or are soon to be responsible for) marketing in a business or an organization
- ✓ Know how to use a computer and a mouse
- ✓ Have a Web site or a physical location (or you soon will)
- ✓ Have a product or service that people need or have an idea for a product or service that people need

## ***How This Book Is Organized***

*Mobile Marketing For Dummies* is divided into five parts according to the different types of mobile marketing campaigns you can create and deploy.

### ***Part I: Getting Up to Speed on Mobile Marketing***

Part I explains where mobile marketing fits into a marketing mix and describes the benefits and limitations of mobile devices as marketing tools. We give you insight into the consumer landscape including tips for understanding laws and industry regulations as well as advice for developing a mobile marketing strategy and choosing partners to help you execute on your plans.

### ***Part II: Executing Direct Mobile Marketing Campaigns***

Part II helps you to build a solid foundation for sending text messages, multimedia messages, and mobile e-mails. We show you how to obtain a common short code, gain opt-in subscribers to your messaging campaigns, and promote your business with messages. We explain how to set up a variety of campaigns and tips for designing e-mails for mobile screens.

## ***Part III: Mobile Media, Publishing, and Advertising***

Part III explains how to go about building mobile Internet sites, mobile applications, and advertising campaigns. Part III also shows you the power of mobile when applied to social media and voice campaigns. We tell you how to use layout and design elements to make your mobile sites effective on mobile devices and we show you how to develop and distribute mobile applications. We explain how to make money through mobile advertising and the importance of making your social media content accessible on mobile devices. Part III also shows you how to enable marketing campaigns using a mobile phone's most used and yet often overlooked feature — voice. After all, it's still a phone, no matter how many other bells and whistles it has!

## ***Part IV: Mobile Commerce and Analytics***

Part IV is where your mobile marketing strategy finds an enduring future. We explain how to enable monetary transactions through mobile devices such as mobile Internet purchases, point-of-sale scanners, and mobile wallets. We also show you how to use mobile marketing analytics to track your campaigns and determine whether your strategy is working.

## ***Part V: The Part of Tens***

In Part V, we include two chapters that list ten important bite-sized summaries of mobile marketing information. The first list contains ten ways to reach consumers on mobile devices today. The second list covers ten mobile marketing resources you should become familiar with so your mobile marketing can advance and grow, along with new advancements in technology and industry best practices. In addition, we include a Glossary to collect the definitions of mobile marketing terms into one convenient resource.

## ***Icons Used in This Book***

When you are scanning through the contents of this book looking for tips, reminders, and ideas, you can look for the following icons in the margin to help you find important information fast:





This icon signifies a tip, idea, shortcut, or strategy that can save you time or trouble.



This icon signifies information that you should remember and file away in your brain for later reference.



This icon signifies important details that might cause your strategy to stumble or come to a halt if left unaddressed.



This icon signifies information that is technical in nature. It's for geeks only, and you can skip it if you don't fit that description.

## *Where to Go from Here*

If you aren't familiar with mobile marketing or if you don't know a lot about mobile devices, you might want to start with Part I and read each chapter in order. If you are an experienced and tech-savvy marketer with a good idea of which direction you want to take your mobile marketing, you can scan through each part's Table of Contents and read the chapters or topics in any order.

Either way, it's time to get started with building your business and deepening your customer interactions with mobile marketing!

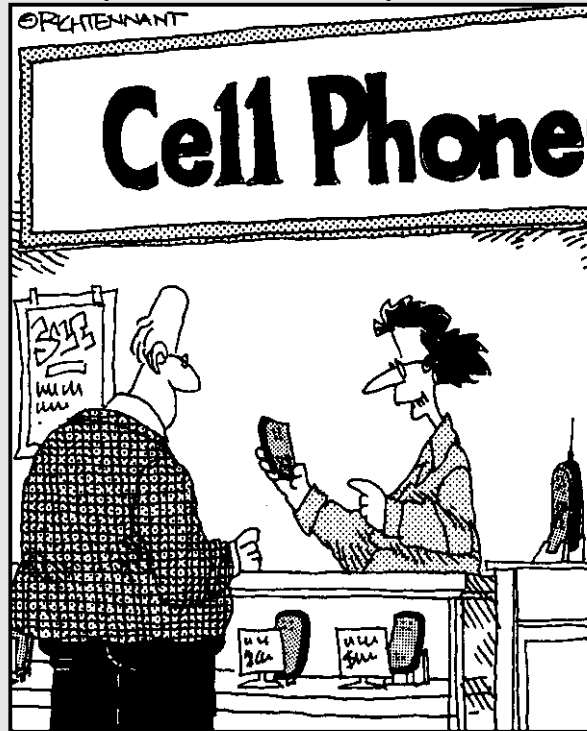


# Part I

# Getting Up to Speed on Mobile Marketing

The 5<sup>th</sup> Wave

By Rich Tennant



"This model comes with a particularly useful function – a simulated static button for breaking out of long winded conversations."

## *In this part . . .*

**A**lmost everything you can do with traditional marketing can be adapted to work on mobile devices. However, marketing through mobile channels isn't always simple. Mobile device standards and best practices are still emerging and consumer behavior and laws are rapidly shifting. Adapting your marketing for mobile is an ongoing task.

Chapter 1 gives you an overview of mobile marketing so that you see the big picture and can identify the possibilities of mobile marketing. This chapter also allows you to easily skip to the other parts of this book that deal with topics in more detail.

Chapter 2 helps you come up with your mobile marketing strategy and shows you how to estimate your mobile marketing reach so you can approach mobile marketing with goal achievement in mind.

Chapter 3 covers the laws, industry regulations, and best practices you need to know in order to keep your mobile marketing campaigns compliant and consumer-friendly.

## Chapter 1

# Unveiling the Possibilities of Mobile Marketing

### *In This Chapter*

- ▶ Discovering mobile marketing and its key elements
- ▶ Exploring the myriad of mobile devices and networks
- ▶ Finding out about the three forms of mobile marketing
- ▶ Reviewing the many capabilities of mobile devices

**W**e've become a mobile society, worldwide. People around the world are on the go, and nearly everyone has a mobile phone or a mobile device of some kind to help them connect with people, information, and businesses from anywhere. Sure, people are still making and receiving phone calls with their mobile phones, but increasingly, they're also texting, searching the Web, downloading applications, consuming content, responding to ads, spending money, and generating value for themselves and marketers, not just with phones but a wide range of devices as explained below.

The mobile device is increasingly becoming a cornerstone of our mobilized society. In fact, for many people around the globe, a mobile device has become their primary communication and commerce tool. Whenever our world changes, so must the practice of marketing. This book is all about showing you how to embrace this change. We show you how to embrace the emerging practice of mobile marketing and engage your customers through and with the mobile devices they use.

In this chapter, we get you started. We provide you with a detailed definition of mobile marketing and review its key elements. And because the mobile device is the cornerstone of any mobile marketing practice, we review in detail the three categories of mobile devices, the networks that enable them, and the eight mobile media paths that are the backbone of mobile marketing. When you're done reading this chapter, you'll have the foundation you need to understand everything else you find in this book.

## Marketers are gravitating to mobile

In June 2010, the Mobile Marketing Association ([www.mmaglobal.com](http://www.mmaglobal.com)), along with *Chief Marketer*, *Advertising Database Express*, and Kinesis Survey Technologies released a study titled, “Second Annual View from Madison Avenue.” According to this study, total U.S. media in 2010 expenditures (the money that marketers allocate to engage their customers through media channels like television, radio, newspapers, outdoor signage and other media channels including mobile) will total about \$128 billion. The MMA report estimates that mobile media will account for 1.8%, or \$2.3 billion, of

this total spending. By 2011, the MMA report estimates that total mobile media spending in the U.S. will grow to \$5.5 billion, or 4.0% of the \$135 billion that will be spent on media in the U.S. This is a 124% increase! Remember, these are just the U.S. media numbers. Mobile marketing is growing all over the world in every market sector. Moreover, as you find through the rest of this book, mobile marketing is not just about media spending but also about engaging your audience in all sorts of ways to deliver value. The impact of mobile marketing is simply staggering.

## Defining Mobile Marketing

*Mobile marketing*, according to the Mobile Marketing Association ([www.mmaglobal.com](http://www.mmaglobal.com)), is “a set of practices that enable organizations to communicate and engage with their audience in an interactive and relevant manner through any mobile device or network.” That definition contains just 26 words, but it packs in a lot of meaningful terminology.

In the following sections, and through this entire book, we discuss what these 26 words really mean and how they can be used to engage your customer in a manner that generates meaningful results that are mutually beneficial for both you, your business, your customers, and potential customers — essentially, everyone!

## Examining the five elements of mobile marketing

Take a look at that definition again and then check out the following bullet points, which pull out and refine the five key elements of the definition of mobile marketing:

- ✓ **Organizations:** Organizations are commercial entities — brands, agencies, marketers, non-profits, enterprises (including individuals), and so on — with products, services, and offerings they wish to deliver to the market. In other words, organizations are you and your companies. Mobile marketing works for any type of business.

- ✓ **Practices:** Practices consist of the many faces and facets of marketing activities, institutional processes, industry player partnerships, standards making, advertising and media placing and buying, direct response managing, promotional engagements, relationship management, customer services, loyalty management, and social media stewardship. In other words, *practices* include all the things that you want to oversee and do to engage your customers. All types of marketing practices can be applied to mobile marketing.
- ✓ **Engagement:** This is the process by which you and your customers interact in a two-way (push and pull) dialogue to build awareness, conduct transactions, support, and nurture each other. Mobile marketing is one of the most engaging forms of marketing because it's done through and with such a personal device.
- ✓ **Relevancy:** Mobile interactions can provide information (for example, a user's location, the time of day, activity, and so on). You can use this information to understand the context of your customer's current environment in order to tailor and to create an appropriate experience that is closely linked (dare I say relevant) to his current context. For example, if someone in New York is doing a search on the mobile Internet for pizza, you want to show them listings for pizza shops nearby and not send them to Lima, Ohio, to get their pizza. Mobile marketing is highly relevant.
- ✓ **Mobile devices and networks:** These terms refer to any wireless-enabled device regardless of form factor or network. Although certain types of devices have their limitations, you can execute some type of marketing campaign on every type of mobile device.

## *Identifying mobile consumers*

Take a moment to think about the impact that the Internet and the personal computer have had on our society and the world. Yet, as of this writing only 25% of the global population uses the Internet, and there are only about 1 billion personal computers.

Now consider the potential impact of mobile devices. Worldwide, 4.6 billion people subscribe to mobile services, and that number will likely increase to 5.5 billion by the end of 2010. Given that there are 6.8 billion people around the world, we're talking about nearly everyone on the planet. (About 2 billion or so people still don't have a mobile device, but you can sure do a lot of marketing with the other 5 billion!)

In the United States, comScore ([www.comscore.com](http://www.comscore.com)) reports that around 234 million people subscribe to mobile phone services. In fact, the mobile phone is becoming their primary phone. According to the Centers for Disease Control, nearly 25% of the U.S. population has shut off their landline phones and are mobile-only. (Another 15% of the U.S. has a landline phone, but really

don't use it.) In addition, many of these people have multiple mobile devices. There are more than 280 million mobile subscriptions in the U.S. (including wireless cards for computers, e-readers, and so on).



The reach of the mobile device is staggering. Nearly everyone on the planet can be engaged with a mobile device. In developing countries, it may be the only way to engage someone digitally.

Your customer is mobile and you should be too. Consumers send trillions of text messages around the world each year, view and download billions of mobile Web pages and applications, and increasingly use their mobile devices not just for personal communication, but also for leisure, entertainment, work, and shopping.

A number of factors play a role in a consumer effectively responding to mobile programs, including her age, gender, ethnicity, location, the type of phone or mobile device she has, her employment levels, education, and more. We can't go into all the details here, but take it from us: mobile media is not a channel just for the youth of the world; nearly everyone is using one or more of the various mobile media paths discussed throughout this book in one way, shape, or form. In fact, according to a Microsoft Advertising Mobile Consumer Usage study, the mobile device is the third-most-used media, coming just behind television and computers.

## *Exploring the types of mobile devices*

When most people think about mobile marketing, the first thing that comes to their mind is a mobile phone. It's easy to look at a mobile phone and think, "It's just a phone," and minimize all the rich capabilities that today's mobile phones have. It's also easy to disregard the other mobile devices (like the Apple iPad or iTouch, PlayStation Portable game terminals, e-books, and GPS devices) that people carry with them as not being pertinent for mobile marketing.



The device in your hand isn't really just a phone anymore. Sure, you can make voice calls with it, but that function is just the tip of the iceberg. Today's mobile devices are also newspapers, maps, cameras, radios, stores, game consoles, video music players, calculators, calendars, address books, stereos, TVs, movie theaters, and concert halls.

For the purposes of mobile marketing, and the content of this book, you should be familiar with three categories of devices:

- ✓ **The feature phone:** The feature phone (see Figure 1-1) is the most common phone out in the market. As of June 2010, about 75% of the phones carried in the U.S. are feature phones. These phones run a real-time operating system (RTOS), which is a *closed operating system* — one in which you can't make modifications such as adding functionality to



a mobile browser or changing the user experience on the phone. There are two common RTOSs: a home-grown Nucleus OS created by the mobile phone's manufacturer, and Qualcomm's Brew (which is predominantly used by Verizon Wireless in the United States). Understanding the capability of the feature phone is important to you because it means you will be limited to engaging these consumers with SMS, MMS, voice, and limited mobile Internet.

✓ **The smartphone:** The smartphone (see Figure 1-2) is a mobile device that integrates mobile phone capabilities with the more common features typically associated with a personal computer, including Internet, applications, e-mail, entertainment, and rich media services. Moreover, smartphones increasingly include location, motion and related sensors, touchscreens, and full keyboards. Smartphones are categorized by the operating system they use. The top smartphone operating systems (OS) are the Apple iPhone, Google Android, Microsoft Windows Phone, Research in Motion BlackBerry, HP Palm, Samsung Baba, Nokia Symbian, and Linux-based operating systems such as the MeeGo, which is used in Nokia high-end phones. Smartphones account for approximately 25% of the U.S. market today. Nielsen expects that by the end of 2011, nearly 50% of consumers will be carrying a smartphone. More and more people will have smartphones and be able to surf the Internet, use e-mail, and download applications, but even by the end of 2011, a significant portion of consumers will still be carrying feature phones, so you'll want to cater to their needs and phone capabilities too.



Keep in mind that it's really easy to get caught up in the hype of a particular manufacturer's marketing. For example, for all the attention it attracts, the iPhone accounts for only 5% of the U.S. market. (See Table 1-1.)

**Figure 1-1:**  
Feature  
phones  
are the  
most com-  
mon type  
of phone  
today.



**Figure 1-2:** Smart-phones represent around 25% of the market and actually have more features than feature phones.



✓ **Connected device:** The connected device category is the industry catch-all term for all non-phone, mobile-enabled devices. In other words, it's a device that leverages mobile networks, but is primarily not a phone. This includes tablet computers (Apple iPad, Cisco Cius, HP Slate), e-readers (Amazon Kindle, Barnes and Noble Nook), portable gaming devices (PlayStation Portable), and so on.

**Table 1-1**                      **Smartphone Device Penetration  
in the United States (comScore, 2010)**

	<i>Percentage of Smart Phone Market</i>	<i>Percentage of Total Market</i>	<i>Users (in Millions)</i>
Research in Motion BlackBerry	42	8	9
Apple	25	5	11
Microsoft	15	3	7
Palm	5	1	2
Google	9	2	4



Throughout this book, we interchangeably use the terms *mobile phone*, *mobile device*, and *phone*. Keep in mind that we're covering all the device categories no matter what term we use.

## Getting to know mobile networks: The basics

The basic premise of mobile marketing is that you're engaging the consumer over *mobile networks*. There are three basic mobile networks:

- ✓ **Mobile carrier network:** The mobile carrier network (also referred to as the operator network) consists of a series of radio towers (so-called *cell towers*) that transmit and receive radio signals that talk with a mobile device. All kinds of technologies and acronyms go into making all this work: CMDA, TDMA, GSM, LTE, EDGE, and so on, but you really don't need to know anything about these. You'll also hear terms like 2G, 3G, and 4G, with the higher numbers referring to faster data speeds over the network. A 4G network is pretty close to broadband Internet speeds over mobile carrier networks (for example, its speed enables things like real-time, interactive video conferencing and social media). Again, you don't need to know much about this, other than to understand that 4G is just starting to get released in the United States and only about 30%–40% of consumers use 3G now. Most consumers are on 2G. This means that a lot of 2G text messaging goes on with very little 4G real-time video streaming. This makes more sense when you read the rest of this book and understand all that you can do with mobile marketing.
- ✓ **Wi-Fi and WiMAX:** *Wi-Fi*, or wireless fidelity, more commonly referred to as a wireless local area network, is a wireless network powered by a small terminal connected to an Internet connection. You see them most often in homes, coffee shops, airports — actually, you see and hear about them all over the place. WiMAX is a Wi-Fi network on steroids. A WiMAX network is a Wi-Fi network that is broadcast over miles rather than a few hundred feet like Wi-Fi. Why should you care about this? Most new phones, that is, smartphones and connected devices, by definition can connect to Wi-Fi and WiMAX networks to access the Internet. In fact, if you try to download really large files, like applications or videos, on devices like the iPhone, the mobile carrier may require you to either switch to a Wi-Fi network or connect to a personal computer to download the content because they'd prefer to restrict these larger data files from being downloaded over the carrier network. A huge amount of mobile marketing (ad serving, application downloading, and mobile Internet browsing) happens over these networks.
- ✓ **Local frequency:** Finally, a number of low frequency channels can be used to exchange data and interact with the mobile device, like Bluetooth, radio frequency identification (RFID), and Near Field Communication (NFC). *Bluetooth* is a low-bandwidth radio spectrum that has a reach of about 1 to 109 yards, depending on the power of the device. RFID and NFC systems are similar in concept to Bluetooth in that they're both short-range communication systems, but they have unique identification and commerce capabilities.

## Getting Your Bearings on the Three Forms of Mobile Marketing

Here are three basic approaches you should consider when integrating mobile marketing into your marketing strategy (you can read more about actually creating your strategy in Chapter 2):

- ✓ Direct mobile marketing
- ✓ Mobile-enabled traditional and digital media marketing
- ✓ Mobile-enabled products and services

The next sections give you an overview of all three approaches so you can decide which approach is going to fit your business best.

### *Direct mobile marketing*

One of the really special things about mobile marketing is that it provides you with the opportunity to interact directly with a person — not a household address, or a post office, or a television network — because mobile devices are personal to a single person.

*Direct mobile marketing* involves sending messages directly to a consumer or receiving messages directly from a consumer. The mobile channel provides you with two basic forms of direct mobile messages to engage your customer, and there's really no middle man:

- ✓ **Marketer-initiated communication:** This occurs when the marketer starts the engagement with the consumer — for example, sends a message, places a call, or pushes an application alert. It is sometimes referred to as *push marketing*.
- ✓ **Consumer-initiated communication:** This occurs when the consumer starts the engagement with the marketer — for example, visits a mobile Web site, places a call, downloads an application, and so on. It is sometimes referred to as *pull marketing*.

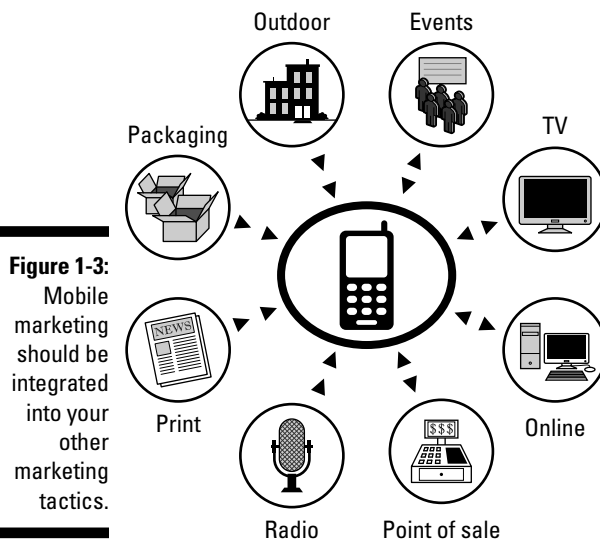
Mobile marketing is an extremely effective direct marketing practice. Marketers consistently see response rates of 8–14% to their initiated communication (compared to less than 1% for most direct marketing channels).



With all forms of direct mobile marketing, you must first get a consumer's explicit permission prior to sending him a text message, making a call, or initiating a communication. Because you need permission, you can't engage in direct mobile marketing without combining your campaigns with other forms of marketing to gain the permission in the first place. You can read about gaining permission in Chapters 3 and 4.

## *Mobile-enabled traditional and digital media marketing*

*Mobile-enabled traditional and digital media mobile marketing* refers to the practice of mobile-enhancing your traditional and new-media programs (TV, radio, print, outdoor media, Internet, e-mail, voice, and so on) and inviting individual members of your audience to pull out a phone or connected device and respond to your mobile call to action, as shown in Figure 1-3.



On television, for example, your call to action may ask viewers to text a keyword to a short code to cast a vote. Or, you may ask them to fill out a form on the Web or mobile Internet, including their mobile phone number, to participate in the program. See Chapter 2 for more on adding mobile marketing to your traditional marketing strategy.

## *Mobile-enabled products and services*

Increasingly, companies are turning to mobile devices and networks to deliver their products and services. For example, banks have launched mobile Web sites and applications so that you can access your bank account to check your balance, transfer money, and find the nearest ATM. Media companies like CNN or ESPN use mobile media as a new media for delivering their content.

A lot of companies are integrating mobile services like text messaging as a way of enhancing the experience with their products. For example, Hasbro recently added text messaging to their last version of the game Clue. Players can receive text messages that influence the flow of the game while they're playing. We explain more about mobile-enabled products and services in Parts II and III of this book.

## *Getting the Most Out of Mobile Devices*

Mobile devices today are increasingly chock-full of really exciting capabilities that you should know about. The capabilities described in the following sections help you determine the *user context*, which means knowing where someone is and what he's doing when he interacts with one of your marketing campaigns so that you can tailor your marketing engaging for optimal results.



Not every mobile device supports all the capabilities described in this section, and not every operating system allows you to access them. You can find out more about what most mobile devices are capable of by visiting the Web site for DeviceAtlas at [www.deviceatlas.com](http://www.deviceatlas.com).

## *Dialing and pressing*

*Dialing and pressing* is all about using the voice channel of the mobile phone. You can encourage people to call a phone number by asking them to dial 1-800-XXX-XXXX to experience the sounds of the movie or call 408-XXX-XXXX to listen in on the game, for example.



You don't have to answer the calls yourself; you can use an *interactive voice response (IVR) system*, which is used to automate phone calls with customers and more commonly for customer support. With an IVR system, when someone calls you, the automated system picks up and asks the caller to make selections such as "Press 1 to receive a ringtone," "Press 2 to get your last five transactions," or "Press 3 to get the movie listings sent to your phone." You can read more later in this chapter about how IVR can humanize your approach. For more background on IVR, see Chapter 11.

## Bar codes and other uses for the camera

Another way to leverage the camera phone is to have it interact with an installed or embedded application on the phone. In Japan, for example, phones have bar-code readers (or QR code readers) embedded in their operating systems. These readers allow users to scan certain types of bar codes called QR codes. QR codes, also called 2D bar codes, come in many varieties; we'll talk more about these in Chapter 5. When a consumer scans the code in a magazine, for

example, the phone automatically recognizes the code and processes the command buried within the bar code. The buried command may instruct the phone to follow a series of instructions, such as: open a mobile Internet browser, go to the restaurant related to the bar code, and then display how many seats are available at the restaurant. The mobile Internet page may even include functions that allow the mobile subscriber to reserve a table.

## Texting

*Texting* simply means sending and replying to text messages. You can place the call to action in traditional, new, and mobile media by saying something like “text *win* to 12345 to enter the sweepstakes.” You can also obtain a mobile subscriber’s opt-in via texting. (For more detail on opt-in management, see Chapter 3 for regulations, Chapter 4 for setting up your programs, or Chapter 5 for examples.)



Mobile marketing programs and any other programs that use text messaging (such as IVR, Internet, or mobile Internet) must use a common short code (CSC) to address and route the message traffic. For details on CSCs, read Chapter 4.

## Snapping and scanning

The camera is a wonderful tool for interacting with your customers. You can instruct audience members to take a picture of a specific object or graphic and then instruct them to e-mail or text (via MMS) the picture to your mobile marketing program. When your program receives a picture, it processes the picture and then opts the mobile subscriber in to the program. The process is also enhanced with services like 2d bar codes. See Chapter 5 for more on these emerging technologies.

Two companies lead the pack in this field: SnapTell ([www.snaptell.com](http://www.snaptell.com)), based in Palo Alto, California, and Los Angeles-based LinkMeMobile ([www.linkmemobile.com](http://www.linkmemobile.com)).

## *Submitting*

Another great way to invite someone into your mobile marketing program is to present her a form on an Internet page or a mobile Internet page, or in an installed application. A customer can opt in to receive text alerts.

## *Using star and pound*

Two companies — Zoove ([www.zoove.com](http://www.zoove.com)) and Singletouch ([www.singletouch.com](http://www.singletouch.com)) — have developed two alternative opt-in channels using symbol keys on your phone for single-button interaction. If, for example, a mobile subscriber on the Sprint network presses **\*\*267** — that is, **\*\*AOL** — and the Send/Talk button on his phone (typically, the green button), in return, an AOL promotional mobile Internet site is sent to his phone. We delve into this feature more in Chapter 5. Both services are still limited in their deployment across wireless carrier networks.

## *Finding the way with location*

Location is a very powerful tool and one of the unique features of mobile marketing. When mobile subscribers are out and about, they *usually* know where they are, but their phones *always* know. Location information can make your programs more contextually relevant to a user's location.

You can identify a mobile subscriber's location in several ways:

- ✓ **User-provided information:** The consumer can provide the ZIP code, address, or phone number of his current location. (If he provides a landline number, you can look up the address in a publicly accessible database.)
- ✓ **CellID triangulation:** Every cellular tower is in a fixed location (big steel towers tend not to move around a lot), and each tower has an identification number, commonly referred to as CellID (cellular tower ID). If you know the IDs of the towers that a mobile phone has in range, you can triangulate the mobile subscriber's location with reasonable accuracy. (This system is how Google Maps works.) High-end phones such as the iPhone, BlackBerry, and Nokia- and Microsoft-powered smartphones can tell your application the CellIDs of the towers they're connected to. Then your mobile application provider can look up the towers' Global Positioning System (GPS) coordinates in publicly accessible databases such as OpenCellID ([www.opencellid.org](http://www.opencellid.org)).



- ✓ **GPS:** The Global Positioning System relies on a constellation of satellites surrounding the planet. The location of a mobile phone equipped with GPS can be determined down to a few yards anywhere on the planet. If the wireless carrier and phone permit this function, an application provider can access the phone's GPS data to enhance the application you're offering.
- ✓ **A-GPS:** Some phones are equipped with Assisted GPS (A-GPS), which combines GPS, CellID, and other enhanced network capabilities to refine the location of the mobile subscriber.
- ✓ **Local access points:** Low-bandwidth transmitter/receivers, such as Bluetooth and Wi-Fi, can be used to approximate a mobile subscriber's location because the access-point transmitters are in fixed locations. When a mobile phone connects to an access point, you can approximate the mobile subscriber's location.
- ✓ **Fem2Cells:** The emerging minitower cellphone technology called Fem2Cells has no practical marketing use today, but I'm noting it here because some applications should be available soon, given all the creative minds out there.

With location, you can create context-sensitive experiences. When a consumer opts in to your mobile marketing campaign, you can send a location-relevant coupon, not just some generic discount for a store halfway around the country from where the consumer is currently located, or you can serve up advertising that's relevant to a nearby establishment.



Many companies such as Yahoo! use search terms and proximity access point data to determine a user's location. The main purpose of this type of location detection is serving location-relevant advertising.

Although location-enabled services are great ideas, we still have some time to wait before location services are ready for use by the average consumer.



Many marketers try to build location services in which the location is the primary value proposition. Location by itself has little value, however; location is an enabling feature that gives value to other services, such as mapping, search, and advertising.

## ***Ticketing and identification with NFC and RFID***

Although the technologies are far from mainstream at this point, some phones are being equipped with RFID and NFC chips. These let you do a lot of really cool things, like device tracking and contactless payment.

In Germany, for example, NFC-enabled phones are used to purchase train tickets. A user simply swipes the phone past an NFC reader, and the reader charges her linked billing account (a credit card) for the purchase of the ticket.

No commercialized version of RFID has been developed yet. But RFID chips can be used to identify you and can even personalize signs as you walk by. (Did you see the scene in *Minority Report* in which Tom Cruise walks by a sign and the sign talks to him? That's what we're talking about.)

## Discovering Available Mobile Paths and Capabilities

*Marketing paths* are the combination of the tools, technologies, and media we use to communicate our messages and reach consumers. For example, advertising on a billboard is often referred to as outdoor advertising, which is one type of marketing path. When it comes to mobile, many different types of marketing paths can be used to reach consumers (see Figure 1-4).

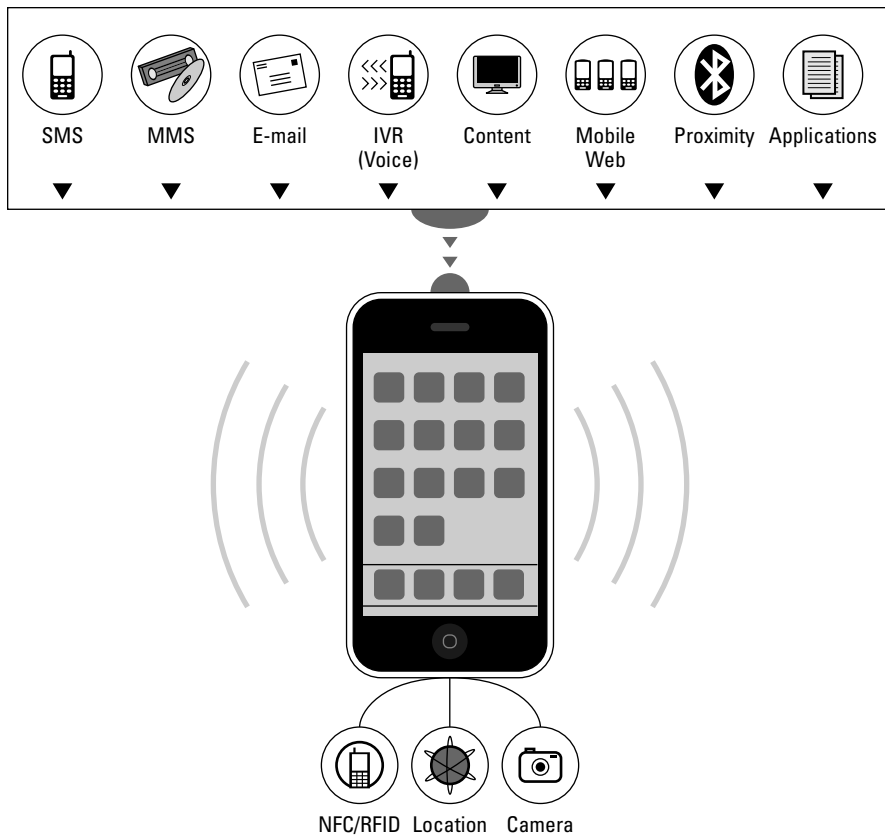
The next sections give you an overview of the different paths so that you are familiar with all the ways you can engage consumers with your messages through mobile marketing.



Although each of the mobile paths can work all by themselves, they are more effective when combined together. For example, a text message can deliver a mobile Web site link, which when clicked may include a phone number link. When that phone number link is clicked, it places a call. The call may present a prompt for the user to say or press 1. When the 1 key is pressed, an application or content download may begin. Granted, this string of linkages would present a terrible user experience, but hopefully it demonstrates that all the paths can work together.

## Defining text messaging (SMS)

*Short message service (SMS)*, commonly referred to as *text messaging* or just *text*, is an incredibly versatile path to nearly all mobile phones on the planet. An SMS is a 160-character alphanumeric digital message that can be sent to and from a mobile phone — that is, it consists of letters (A, B, C, D, a, b, c, d . . .) and numbers (1, 2, 3, 4, !, @, #, \$ . . .) that can be exchanged among mobile phones.



**Figure 1-4:**  
The paths  
within the  
mobile  
channel.



Keep in mind the 160-character limit includes spaces. You'll need to get creative with abbreviations to get the most out of your message. There are some pretty standard word abbreviations common in popular culture that you can think about using; just be sure to know your audience to determine their adoption level of these abbreviations. Not everybody will LOL (laugh out loud) if they don't understand the message.

Text messaging is an extremely popular service that caught on in the United States via TV shows that asked people to text in to cast votes or win prizes. From these basic roots, text messaging has blossomed into a rich interactive medium. In the United States, billions of text messages are sent every day. In fact, text messaging has become the primary mobile communications medium. Collectively, we're sending more than 2 billion text messages a day in the United States alone!

More than just a person-to-person channel, text messaging is now the cornerstone of mobile marketing. In addition to offering voting services, you can launch trivia programs, provide search capability, send information and text alerts, trigger interactive calls, deliver content, operate coupon programs (see Figure 1-5), and even charge people for content and services consumed on the phone (such as ringtones and television subscriptions).



**Figure 1-5:**  
Text  
messaging  
coupons are  
a popular  
form of  
promotion.

See Chapters 4 and 5 for details on what you can do with SMS in the context of mobile marketing.



Text messaging may also be used as a billing medium for content to be consumed on the phone (such as games, applications, ringtones, and images) as well as for charitable donations billed to the mobile subscriber's phone bill. When used in this context, text messaging is referred to as Premium SMS, or PSMS. See Chapter 13 for more on this topic.

Leading text messaging application providers include iLoop Mobile ([www.iloopmobile.com](http://www.iloopmobile.com)), Waterfall Mobile ([www.waterfallmobile.com](http://www.waterfallmobile.com)), Vibes Media ([www.vibes.com](http://www.vibes.com)), Velti ([www.velt.com](http://www.velt.com)), 2ergo ([www.2ergo.com](http://www.2ergo.com)), Mobile Interactive Group ([www.migcan.com](http://www.migcan.com)), and others.

## *Making it rich with multimedia messaging (MMS)*

*Multimedia Messaging Service (MMS)* is sometimes referred to as *picture messaging* or *video messaging* to help differentiate it from SMS, which is text-only messaging. MMS is delivered almost the same way as text messaging, but can include multimedia objects (images, audio, video, or rich text), often in a slideshow format, meaning that the multimedia objectives are sequenced and played per the publisher's established script and timing. Because MMS supports more than text — and because a picture is worth a thousand words — with MMS, you can

- ✓ Tell a story with captivating images, sound and full motion video to delight, entertain, inform, and engage
- ✓ Embed links to mobile Web sites in the message to IVR call services, application storefronts, and more so that your viewers can get more information
- ✓ Offer compelling coupons with pictures, sound, and even video

You need to use a mobile marketing application provider that specializes in MMS to power your MMS programs. We show you a number of ways to use MMS in Chapter 6.

## *Mobilizing your e-mail*

An e-mail message can be originated and delivered from any standard e-mail system or through mobile carrier networks. E-mail can be an effective means of delivering messages to a mobile phone or mobile-enabled terminal. Messages are accessed on the phone via the mobile Internet browser or via an e-mail application installed on the phone.

Mobile e-mail is most popular on a class of mobile phones referred to as *smartphones*, including Research In Motion's BlackBerry, Apple's iPhone, and phones running Google's Android software or Symbian and/or Microsoft mobile operating systems. E-mail is rarely used specifically with mobile marketing in mind; controlling the user experience is difficult, and many technical hurdles and legal land mines still need to be overcome. See Chapter 7 for more details on mobile e-mail marketing.

Leading companies that specialize in e-mail marketing services include Constant Contact ([www.constantcontact.com](http://www.constantcontact.com)), mobileStorm ([www.mobilestorm.com](http://www.mobilestorm.com)), CheetahMail ([www.cheetahmail.com](http://www.cheetahmail.com)), Trumpia ([www.trumpia.com](http://www.trumpia.com)), and Silverpop ([www.silverpop.com](http://www.silverpop.com)).

## *Humanizing your message with voice*

The *voice path* refers to your phone's standard telephone capability — the means by which you make and receive phone calls, in addition to talking with a live person. Another option? Remember the tip we gave you earlier in this chapter? Use an interactive voice response (IVR) system commonly used in automated customer support. When you call most businesses today, you reach an automated prompt that tells you to say or press 1 to get this, or to say or press 2 to get that.

IVR can be a power mechanism for marketing activities beyond support. An example of using voice for mobile marketing is streaming audio via the voice channel. National Public Radio (NPR) uses the voice channel to stream live and recorded radio broadcasts via the voice channel of mobile phones. You can dial a toll-free number and listen to an NPR show. Alternatively, you can send a text message or click a link on a mobile Web site, and suddenly your phone rings. When you pick up, you hear the live or recorded broadcast piping through the phone. For more on engaging your customers with voice, see Chapter 11.



Be sure to leave enough time to beta test your IVR program; nothing will frustrate your customers more than feeling like they are locked into talking to a computer without getting the answers they need. IVR done well is mobile efficiency at work; IVR done badly is a great way to alienate your customers and possibly lose a few to frustration.

Leading IVR mobile services providers include Angel.com ([www.angel.com](http://www.angel.com)), CommerceTel ([www.commercetel.com](http://www.commercetel.com)), and SmartReply ([www.smartreply.com](http://www.smartreply.com)).

## *Reaching people on the mobile Internet*

The term *mobile Internet* is used primarily to refer to browsing Web sites on a mobile device. The Internet connection on a mobile device, however, can also be used to power the data connection for applications (see Chapter 9). For the purposes of this book, when we refer to the mobile Internet, we're referring primarily to mobile browsing.

With the mobile Internet, you can create rich and compelling mobile experiences filled with text, colors, and images. You don't need to create an entire Web site for a mobile campaign, though. You can create a *microsite* or *landing page* — a smaller version of a mobile Internet site. The difference between a microsite and a mobile Internet site is that the mobile Internet site is designed to be persistent — to hang around for a while — whereas a microsite or landing page tends to be designed for a specific marketing promotion. A site of this sort may hang around for a few months, but at the end of the

promotion, the marketer turns it off. Also, unlike persistent mobile sites, microsites tend to have very few pages, with content limited strictly to the promotion. Figure 1-6 shows some examples of promotional microsites.

**Figure 1-6:**  
Mobile  
Internet  
microsites  
can be used  
for time-  
sensitive  
programs.



Leading mobile Internet service providers include iLoop Mobile ([www.iloomobile.com](http://www.iloomobile.com)), Starcut ([www.starcut.com](http://www.starcut.com)), MAXX Wireless ([www.maxxwireless.tv](http://www.maxxwireless.tv)), Netbiscuits ([www.netbiscuits.com](http://www.netbiscuits.com)), Velti ([www.velt.com](http://www.velt.com)), Madmobile ([www.madmobile.com](http://www.madmobile.com)), July Systems ([www.julysystems.com](http://www.julysystems.com)), iconmobile ([www.iconmobile.com](http://www.iconmobile.com)), Wapple ([www.wapple.net](http://www.wapple.net)), 2ergo ([www.2ergo.com](http://www.2ergo.com)), Mobile Interactive Group ([www.migcan.com](http://www.migcan.com)), Siteminis ([www.siteminis.com](http://www.siteminis.com)), UNITY Mobile ([www.unitymobile.com](http://www.unitymobile.com)), and others.



When looking for a service provider to design your mobile site or microsite, look for one that knows and understands the challenges involved with the browsing interface on a mobile phone, including up-and-down scrolling, bread-crumbs-based navigation, and the difficulty of adding visual interest without using mobile browser killers like Adobe Flash artwork (leading method of distributing video on traditional Web sites) or badly formatted video.

## *Engaging consumers with applications and downloads*

Installed applications such as games, social networking, news and weather, navigation, banking, entertainment, messaging (SMS, MMS, e-mail, instant messaging, or picture messaging), audio and video players, and browsers may be preinstalled on the mobile phone by the manufacturer or wireless carrier. Alternatively, they may be installed by mobile subscribers who download them via the mobile Internet; embedded links in received text messages; from an application store; or a process called *side loading*, in which the phone is connected to a computer and the applications are sent from the computer to the phone.

Applications can provide a rich interactive experience beyond the limitations of the mobile browser. Special applications can be installed on a phone to serve streaming video (TV) and audio (radio), social networking services, and a wide range of other services.



Not all phones support installable applications, and some wireless carriers don't allow these applications to connect to the Internet after they've been installed. However, as more people adopt smartphones, this will change. Applications are a huge and growing part of the mobile marketing marketplace.



Mobile applications (often just called *apps*) are growing in number exponentially. With this trend comes competition. If you want consumers to download your app, make sure it has lots of usable functionality and lots of relevance to your consumer's needs. App development can be costly, so do your homework on consumers' interest in an app first. With thousands of apps to choose from, many apps are developed at great expense and then ignored by consumers because they didn't offer anything consumers couldn't live without.

## ***Making connections through proximity paths: Bluetooth and Wi-Fi***

The proximity paths, Bluetooth and Wi-Fi, may be used to engage consumers in what is referred to as *proximity marketing*, or the localized distribution of content to a mobile device. The *Bluetooth path* refers to the use of the Bluetooth communication channel on the phone.

That little blue icon on your phone represents Bluetooth capability. If you use Bluetooth, you probably use it to pair your phone with a peripheral device such as a wireless headset or hands-free car kit. You also may use it to sync your phone with your laptop computer or to send pictures from your phone to your printer. Wi-Fi is the channel that connects your phone to the Internet via a Wi-Fi access point.

In addition to working with peripheral devices, both Bluetooth and Wi-Fi can be used for mobile marketing — a practice called *Bluecasting*. A marketer places Bluetooth access points and a Bluetooth transmitter in a public area (such as a mall, airport lounge, bus stop, or movie theater) or at a live event. When a consumer walks by the access point, if his phone is set to receive Bluetooth requests automatically, his phone beeps, and he's asked to accept a pairing request from the Bluetooth access point. If he accepts the request, the Bluetooth access point sends an image, ringtone, game, or other communication to his phone.

Leading Bluecasting providers include BLIP Systems ([www.blipsystems.com](http://www.blipsystems.com)), Ace Marketing ([www.acemarketing.net](http://www.acemarketing.net)), AURA ([www.aura.net.au/](http://www.aura.net.au/)), Proximity Media ([www.proximitymedia.com](http://www.proximitymedia.com)), and others.





Make sure you are clear with your Bluecasting permission statements. Pushing content to consumers' phones without the consumers' solicitation or consent is a modern-day discourtesy sometimes termed *Bluejacking*. Make sure you look into standards and the code of ethics here to ensure you are helping your customers, not annoying them. Also, never, never, ever engage in *Bluesnarfing*, which is the unauthorized access of information from a wireless device through a Bluetooth connection. Bluesnarfing is illegal in many countries due to privacy issues involved with unauthorized access to personal information such as contacts and calendars.

## *All hands on deck: Manning your portals*

As you research different ways to engage your customer through and with the mobile channel, you may come across the terms *on-deck* or *off-deck* or *carrier portal*. *On-deck* and *carrier portal* refer to the same thing: They are the default mobile Web and application portals set by the carrier on mobile phones running on their networks. The carrier portal is prime real estate to engage consumers; for example, more applications are still downloaded from the carrier portals combined than from popular application stores like Apple iTunes.

Apple iTunes, or any non-carrier applications like iTunes or Getjar ([www.getjar.com](http://www.getjar.com)), illustrates the concept of off-deck. *Off-deck* refers to any non-carrier-controlled mobile presence. Increasingly, as consumers adopt smartphones, download applications in the billions, and are more and more mobile, more traffic will move off the carrier deck and into the hands of the market.

## *Advertising on the small screen*

Although not necessarily a stand-alone path or channel, mobile advertising is also an effective means of engaging prospective customers. Mobile advertising is the practice of placing a paid sponsor or promotional messaging within one of the various mobile media paths listed previously. With mobile advertising, you can

- ✓ Build your brand
- ✓ Acquire new customers and generate sales
- ✓ Monetize your mobile media paths and portals

You can accomplish so much with mobile advertising. See Chapter 8 for more details. Leading players include AdMob, recently acquired by Google ([www.admob.com](http://www.admob.com)), Millennial Media ([www.millennialmedia.com](http://www.millennialmedia.com)), Crisp Wireless ([www.crispwireless.com](http://www.crispwireless.com)), JumpTap ([www.jumptap.com](http://www.jumptap.com)),

Smaato ([www.smaato.com](http://www.smaato.com)), Microsoft Advertising (<http://advertising.microsoft.com>), and others.



Having a hard time with consumers catching on to your brand's mobile presence? Go where you know the mobile users are — place mobile advertising on related mobile sites and apps that you know your consumers frequent. Use these popular sites to crowd source for you.

## *Cashing in on mobile commerce*

*Mobile commerce*, as defined by the Mobile Marketing Association ([www.mmaglobal.com](http://www.mmaglobal.com)), is the one- or two-way exchange of value facilitated by a mobile consumer electronic device (for example, a mobile handset) enabled by wireless technologies and communication networks. This may sound a bit complicated, but it's really not. It means that billions of dollars are exchanged every day from transactions occurring via the mobile media paths we discuss in this chapter. People buy content (applications, ringtones, and images), purchase physical goods and services, make donations, and even buy virtual goods (like virtual furniture for their online house or clothes for their game avatar). For more on mobile commerce, see Chapter 13.

## Chapter 2

# Mapping Out Your Mobile Marketing Strategy

---

### *In This Chapter*

- ▶ Understanding how mobile marketing fits into your marketing plans
  - ▶ Identifying key players to help enable your strategy
  - ▶ Calculating the costs of mobile marketing
  - ▶ Aligning goals to your potential reach
- 

**D**eveloping a mobile marketing strategy can be fairly straightforward; however, the task does involve reviewing a lot of data and sifting through marketing objective, technology, and channel details that are unique to mobile marketing. You then need to integrate these details with your overall multichannel marketing strategy. Developing and executing an effective mobile marketing strategy takes time, attention, and a keen understanding of every aspect of your market, your business, and even other businesses that provide the mobile services and connections you need.

You can make the processes as detailed and complex (or as simple) as you like, but keep in mind that developing a strategy is an iterative, try, learn, try again process. Take comfort, however, in the fact that firms both large and small throughout the world have developed and executed on mobile marketing strategies to generate results and return on their investments. You can do it, too!

This chapter outlines the process for mapping out your mobile marketing strategy. We explain how to formulate your objectives and identify key players in the mobile marketing industry that you need to interact with for your strategy to work. We show you how to calculate the costs of mobile marketing and how to evaluate your reach so you can start to define your audience and the potential size of your audience.

## Adding a Mobile Strategy to Your Marketing Plan

Marketing, at its core, is about communication and engagement. As a marketer, it's your job to communicate and engage your customer; that is, impart information and news about your products, services, and related activities to your audience (customers, clients, partners, and society at large) so that they can know what your organization does and how to engage with your offers.



Mobile marketing is basically a very powerful way of enabling communication and engagement with your prospects and customers in all sorts of interactive and productive ways.

When you're planning to employ mobile marketing, you should first start with your high-level goals and objectives before you jump into tactics and execution details. You should start by thinking about how you'll weave mobile marketing into your entire marketing plan. In other words, you'll want to keep your overall goals in mind (company and product branding, customer acquisition, retention and relationship management, support/care, social media engagement) as you assemble the parts of your plan. Your overall goals may include one or more of the following:

- ✓ **Increasing brand awareness and recall (*branding*):** Increase the number of potential customers that know about you, the number of news stories or blog posts written about you, click-through rates on a mobile Web site, consumer brand recall of your marketing, or your advertising programs and brand.
- ✓ **Generating leads and identifying new prospects (*acquisition*):** The objective here is to fill up the opt-in database so that you have qualified, interested people to market to in the future.
- ✓ **Acquiring new customers (*acquisition*):** Generate initial transactions from first-time buyers, drive first-time attendance to events or traffic to retail stores.
- ✓ **Increasing revenues and profits from existing customer base (*retention and relationship management*):** That is, generate repeat purchases from customers both for existing and new products at sustainable profit levels.
- ✓ **Enhancing existing customer loyalty and activity (*retention and relationship management*):** For example, increase loyalty point redemption, stimulate word-of-mouth activities, increase customer participation in programs, drive attendance to an event, store, Web site, and so on.
- ✓ **Improving resolution time for all customer inquiries/complaints (*customer support/care*):** Make people happier by addressing their questions, issues, and problems in a cost-effective, low-stress, timely manner.

- ✓ **Stimulating social media engagement world-of-mouth/viral marketing activities (*social media engagement*):** Get your audience talking positively about you, evangelizing your service with the market and offering support.



These are not simply *mobile marketing* objectives, but *marketing* objectives. Remember, mobile marketing is simply a tool to help you deliver value to your customer, to help you market and achieve your company's objectives.

The following sections explain the key resources you need to get your mobile marketing plan under way with your overall objectives in mind.

## *Harnessing information and experience*

To build a successful mobile marketing plan, draw upon the following:

- ✓ **Industry experience:** Industry experience, both yours and your partner's, pertains to your specific industry, such as retail, to the overall mobile marketing industry, and to the way mobile marketing can be used in your industry. You can also accelerate your expertise and experiences by joining a trade association like the Mobile Marketing Association ([www.mmaglobal.com](http://www.mmaglobal.com)) and an association that caters to your business (like Shop.org for retail).
- ✓ **Historical customer data, trends, and predictions:** Gather as much data as you can (research analyst reports, case studies both from your industry and others, your past customer transactions, and so on). You can find this data in your own company databases, in industry news articles, at industry trade associations, in industry analyst reports, on sites like Slideshare ([www.slideshare.com](http://www.slideshare.com)), Marketing Charts ([www.marketingcharts.com](http://www.marketingcharts.com)), Pew Internet Research ([www.pewinternet.com](http://www.pewinternet.com)), and countless other sources. Data is everywhere. See the section, "Including Customer Analysis in Your Strategy" later in this chapter for more.
- ✓ **Competitive analysis:** Conduct a competitive analysis and evaluate the competition. Understand what they're doing, think about what they might do, and consider the way these actions will affect your response to them and the market. You must be a chess player, thinking several moves ahead. Great sources of competitive analysis include reviewing your competitor's Web site, reading their press releases, and listening to them speak at conferences.
- ✓ **Industry best practices and rules:** As noted in Chapter 3, make sure you understand the industry best practices and regulations.

Gathering all this information and experience takes time. Moreover, sifting through it all and generating insights that help you make decisions also takes time. So don't wait. Get started now and, over time, you'll become an expert!

## *Identifying seven key components of a mobile marketing plan*

Your marketing objectives, and all the information you collect to support your plan, should be written down and included in a plan that provides a complete 360 degree view of your mobile marketing efforts. Your plan should cover the following seven key components:

- ✓ **Your target audience:** The plan should specifically call out who you want to reach — your prospects, customers, partners, society at large, and so on.
- ✓ **Your offerings:** The plan should detail exactly what you offer and the value your customers will get from the offers; in other words, how will your offers fulfill their needs, alleviate their pains, and meet their demands. In addition, you should think about how your offerings will change as your customer moves through the *journey* — a marketing concept that refers to the stages of customer engagement. See the next section, “Managing the Customer Journey.”
- ✓ **Your quantified objectives:** You should detail what it is you want to accomplish, such as increase brand awareness, improve sales in a particular region by X percent, become the number one player in your market within Y years by holding Z percentage of the market share, and so on.
- ✓ **Resources:** Your plan should detail all the resources (people, partners, money, technology, services, and so on) you need to accomplish your objectives.
- ✓ **The communication efforts:** Your plan should be very specific as to what you want to say to the market, and the channels, including mobile, you use to communicate your message to the market. Also be specific about how this message and your communications will change through every stage of the customer lifecycle.
- ✓ **Delivery channels:** Your plan should detail how you plan to get your offerings out to the market.
- ✓ **Exchange:** Finally, your plan needs to be specific regarding how you’ll conduct your business and exchange value with your audience.

## *Managing the customer journey*

For your marketing to be successful, you must understand your customer’s *journey*. The journey, in this sense, includes all the engagements you have with your customers from the time they first start thinking about taking an action, for example, buying a house, to the point they stop. To understand your customer’s journey, you should consider both the customer

lifecycle — that is, the stages of engagement with your customers — as well as the specific thought processes your customers take when they're considering buying a good or a service. When you understand this thought process, you can then find ways to augment this journey through mobile marketing practices using all the tools and techniques discussed throughout this book.

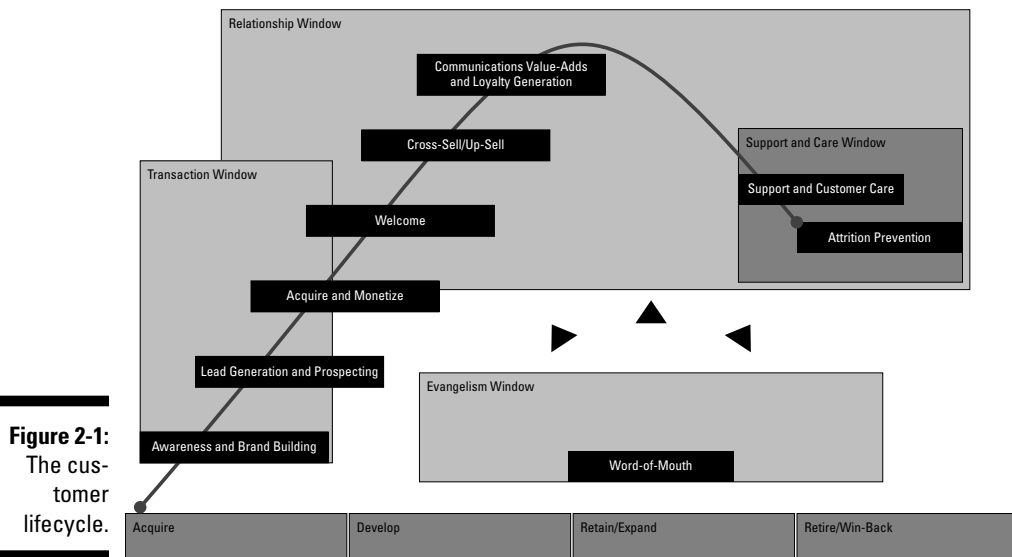
The customer *lifecycle* is a concept you can use to develop a broad understanding of how you interact with and engage your customers. In the lifecycle, shown in Figure 2-1, all customers go through a few “windows” of engagement as they interact with you:

- ✔ **Transaction window:** This marks the first time you communicate or engage with a customer regarding your product or service offerings. The objective in the transaction window is to “acquire” the customer — that is, have them buy something from you or use your product or service.
- ✔ **Relationship window:** After you've successfully acquired a customer, you have started a relationship with her. In the relationship window, you look to nurture the relationship and have her buy more from you over time.
- ✔ **Support and care window:** In the event that some aspect of your relationship or transaction with the customer isn't working — the customer doesn't understand your product, say, or your product breaks in shipping — your customer may contact you for help and support. When she does so, she's entered the support and care window. The objective in this window is to solve the customer's problem or answer her question in a satisfactory, cost-effective way so that the customer may re-enter the relationship window.
- ✔ **Evangelism window:** The evangelism window refers to using social media sites like Facebook ([www.facebook.com](http://www.facebook.com)), Twitter ([www.twitter.com](http://www.twitter.com)), or Foursquare ([www.foursquare.com](http://www.foursquare.com)) to encourage your customers to share their positive experiences about your products and services with their personal networks.

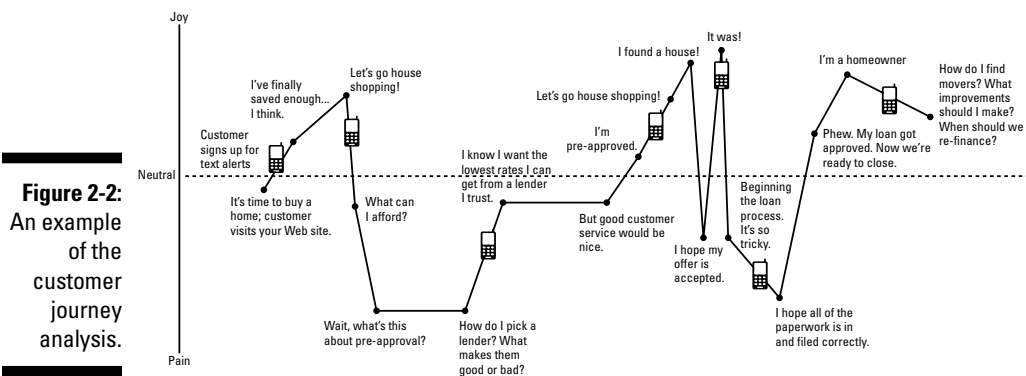
Within this customer lifecycle, consider your interactions with customers at a more granular level; that is, as a series of interactions that may occur within any one of the above lifecycle windows. We call this exercise *customer journey analysis*. Performing a customer journey analysis is a good way for you to begin to understand your customer's behavior in great detail. It also helps you understand how mobile marketing can improve your customer's overall experience with you. The customer journey specifically refers to all the actions a customer takes from the initial stage of wanting to do something, such as buying a house, to the conclusion of the activity, that is, buying or not buying the house.

Angel Evan from Dark Matter ([www.the-dark-matter.com](http://www.the-dark-matter.com)), a leading mobile marketing strategic agency, has provided the example of a customer journey analysis shown in Figure 2-2. In this example, a customer moves through the process of buying a home. From a mobile perspective, note that different stages in the customer journey offer many possible points of mobile

interaction. For example, when a customer decides to buy a home, she may start by visiting your Web site, where a link allows her to sign up for text messaging alerts about houses that meet her profile. (See Chapter 5 for more about text alerts.)



*Adapted from the Direct Marketing Association. Used by permission.*



*Courtesy of Dark Matter*



## *Designing your mobile tools based on a variety of device features*

Mobile devices today are more than simple telephones: They're rich computing platforms that come in various shapes and sizes, running off of a myriad of networks and on numerous operating systems that support a wide range of variant capabilities. In fact, as noted in Chapter 1, they may not even be phones.

Creating the best mobile experience for your customers starts with usability of the mobile experience you want to build. Your marketing plan needs to take into account the following challenges with mobile devices in order to be effective:

- ✓ The screens vary and are typically smaller than most computer screens.
- ✓ Navigation is limited on a mobile device. You're dealing with a different keyboard and no mouse, and up and down and side to side navigation varies. See Figure 2-3.
- ✓ Mobile devices have no or limited printer access.
- ✓ Bandwidth may be restricted, although this is becoming less of an issue with smartphones and the latest networks.
- ✓ Data connections often cost money (in some cases, a lot of money).



**Figure 2-3:**  
The keyboard is limited on most phones, so don't ask users to type a lot.



Don't get discouraged. The positive features of newer smartphones outweigh the challenges. Your mobile marketing solution can still use rich methods of information exchange. Here are some of the things that mobile devices excel at:

- ✓ Taking, displaying, and exchanging pictures
- ✓ Taking, playing, and exchanging videos
- ✓ Recording, playing, and exchanging music
- ✓ Sending messages via SMS, MMS, or e-mail
- ✓ Telling you where they are (GPS-based features)
- ✓ Facilitating commerce (transaction ability built-in)
- ✓ Browsing the Internet
- ✓ Oh, yeah, and making calls, too

## *Choosing an approach for getting it done*

There are the four basic approaches to choose from when executing a mobile marketing strategy or campaign:

- ✓ **Do-it-yourself:** With this approach, you go it alone: You develop your own strategies, create and execute your own programs, and build all your own technology. This takes a massive commitment and investment — think things through before taking on this approach.
- ✓ **Agency:** With an agency approach, you contract with one or more marketing agencies or specialized mobile agencies or service providers to handle everything for you.
- ✓ **Platform:** With the platform approach, you handle the strategic, creative, and tactical execution of programs yourself, and you use a mobile service provider's licensed software application or platform for your technology.
- ✓ **Hybrid:** With the hybrid approach, you choose elements of each of the two aforementioned approaches. For example, you may outsource creative work to a mobile service provider or agency and keep strategy for yourself, or license a platform for one part of a campaign.

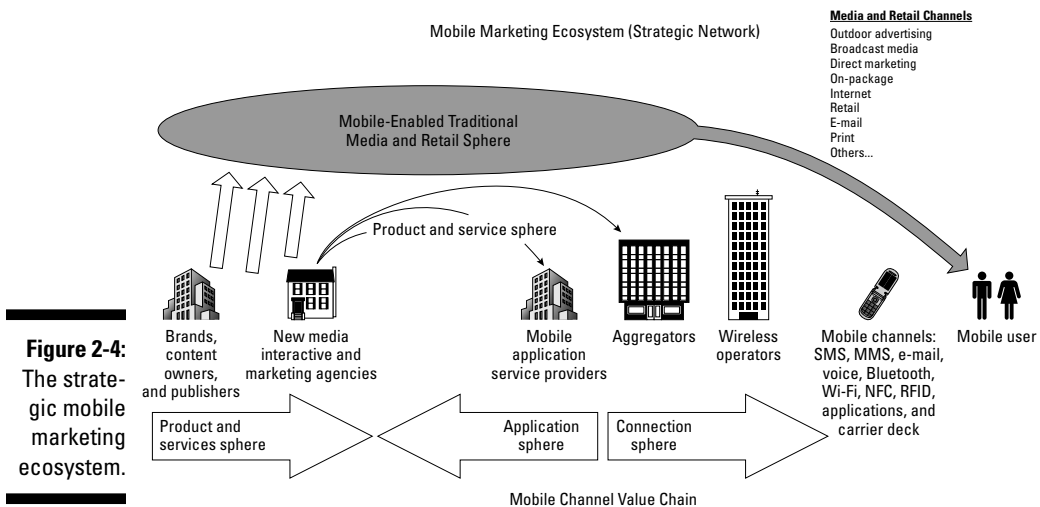


Which approach you select depends on how much of the overall mobile marketing process you want to personally take on and what pieces you see as being critical to your company's competitive advantage and core business offerings.

## Including Mobile Service Providers in Your Strategy

Mobile marketing isn't something you should plan to do all alone. In order to get your mobile marketing done, you need to include other service providers from the mobile marketing industry.

The companies that enable mobile marketing to happen on a technical and professional level are called *mobile service providers*. Mobile service providers are people, companies, business practices, and marketers all ready and willing to help you leverage the myriad of mobile paths so that you can engage your customers with compelling mobile and mobile marketing programs. Mobile service providers are a part of the entire *strategic mobile marketing ecosystem* (shown in Figure 2-4).



Courtesy of iLoop Mobile and Michael Becker

In order to successfully launch a mobile marketing campaign, you should consider working with one or more of the following mobile service providers:

- ✓ **Traditional media providers:** When you use mobile to connect with customers, you have to follow certain rules and regulations designed to offer the consumer a certain amount of control. Traditional media providers are well versed on these regulations and guidelines and are good for those not willing or able to research the laws. Traditional media players include television, newspapers, magazines, radio stations, retail and point-of-sales displays, e-mail, Internet, billboard providers, and other out-of-home promotional media players. For example, most aspects

of mobile marketing legally require consumers to explicitly opt-in to receive your messages. Unless your customers and prospects already know how to contact you and take the initiative themselves, you must obtain a mobile subscriber's consent via a medium other than mobile, as shown in Figure 2-5. You can read more about opt-in in Chapters 3 and 4.

- ✓ **Wireless carriers:** Wireless carriers (also commonly referred to as mobile operators, wireless networks, or wireless operators) provide the piping, towers, billing systems, support, outlets, and more so that you can engage your customers via the mobile channel. You may be surprised to discover that there are literally hundreds of wireless carriers around the world. The United States has about 50, but the market is dominated by the big four national carriers: AT&T Mobility, Sprint, T-Mobile, and Verizon Wireless. These four companies account for about 93 percent of all the mobile subscribers in the country.
- ✓ **Connection aggregators:** You aren't likely to work directly with a wireless carrier, unless you work for a very large brand. Instead, you will work with a connection aggregator. *Connection aggregators* are companies that contract with and, well, "aggregate," messaging (including SMS, MMS, content, and billing services) across multiple wireless carriers both locally and throughout the rest of the world. Aggregators are the bridge between you, the wireless carriers, and other service providers. You can work with one connection aggregator and gain access to literally hundreds of wireless carrier networks around the world. Aggregators help make the market more efficient because application providers and wireless carriers don't need to enter into hundreds or thousands of independent contracts to reach their customers. The majority of marketers do not need to work directly with wireless carriers or aggregators; instead, your application provider will take care of these relationships for you. The leading aggregators include Mobile Messenger ([www.mobilemessenger.com](http://www.mobilemessenger.com)), Syniverse ([www.syniverse.com](http://www.syniverse.com)), OpenMarket ([www.openmarket.com](http://www.openmarket.com)), mBlox ([www.mblox.com](http://www.mblox.com)), Sybase 365 ([www.sybase.com](http://www.sybase.com)), MX Telecom ([www.mxtelecom.com](http://www.mxtelecom.com)), Ericsson ([www.ericsson.com](http://www.ericsson.com)), Netsize ([www.netsize.com](http://www.netsize.com)), Clickatel ([www.clickatel.com](http://www.clickatel.com)), and Motricity ([www.motricity.com](http://www.motricity.com)).



Many aggregators specialize in one or more countries, so if you're going global, you may need to work with a few aggregators and/or your application provider (see below) will.

For a thorough list of connection aggregators, visit the connection aggregator section at US Short Codes Administration at [www.usshortcodes.com/csc\\_aggregators.html](http://www.usshortcodes.com/csc_aggregators.html).

- ✓ **Application providers:** Application providers provide the software and support services necessary to deliver mobile marketing campaigns to your customers and prospects. These companies are called *application providers* because they provide the applications that power the customer experience. For example, if you're planning an SMS campaign, you need an SMS application to create and send the text messages. Table 2-1 shows a list of some of the most prominent application providers.

**Figure 2-5:**  
A point of  
sales  
display  
promotion  
in a retail  
setting.



**Table 2-1**

## Mobile Marketing Application Providers

### Leading Application Providers

Text messaging	iLoop Mobile ( <a href="http://www.iloopmobile.com">www.iloopmobile.com</a> ), Waterfall Mobile ( <a href="http://www.waterfallmobile.com">www.waterfallmobile.com</a> ), Vibes ( <a href="http://www.vibes.com">www.vibes.com</a> ), Impact Mobile ( <a href="http://www.impactmobile.com">www.impactmobile.com</a> ), 2ergo ( <a href="http://www.2ergo.com">www.2ergo.com</a> ), Celtra ( <a href="http://www.celtra.com">www.celtra.com</a> ), Velti ( <a href="http://www.velt.com">www.velt.com</a> ), mobileStorm, ( <a href="http://www.mobilestorm.com">www.mobilestorm.com</a> ), Ping Mobile ( <a href="http://www.pingmobile.com">www.pingmobile.com</a> ), Telescope ( <a href="http://www.telescope.tv">www.telescope.tv</a> ), Textopoly ( <a href="http://www.textopoly.com">www.textopoly.com</a> ), and others.
Multimedia messaging (MMS)	Mogreet ( <a href="http://www.mogreet.com">www.mogreet.com</a> ) and CellySpace offered by Skycore ( <a href="http://www.cellyspace.com">www.cellyspace.com</a> ).
E-mail	Constant Contact ( <a href="http://www.constantcontact.com">www.constantcontact.com</a> ), ExactTarget ( <a href="http://www.exacttarget.com">www.exacttarget.com</a> ), Harte-Hanks ( <a href="http://www.harte-hanks.com">www.harte-hanks.com</a> ), Trumpia ( <a href="http://www.trumpia.com">www.trumpia.com</a> ), CheetahMail ( <a href="http://www.cheetahmail.com">www.cheetahmail.com</a> ), Merkle ( <a href="http://www.merkle.com">www.merkle.com</a> ), mobileStorm ( <a href="http://www.mobilestorm.com">www.mobilestorm.com</a> ) are just a few of many traditional e-mail providers. A few specialize in mobile push e-mail, like Research in Motion ( <a href="http://www.researchinmotion.com">www.researchinmotion.com</a> ), Good Technologies ( <a href="http://www.good.com">www.good.com</a> ), and Eco Files ( <a href="http://www.ecofilesmobile.com">www.ecofilesmobile.com</a> ).

(continued)

**Table 2-1 (continued)**

<b>Leading Application Providers</b>	
Bluetooth	BLIP Systems ( <a href="http://www.blipsystems.com">www.blipsystems.com</a> ), Ace Marketing ( <a href="http://www.acemarketing.net">www.acemarketing.net</a> ), and Proximity Media ( <a href="http://www.proximitymedia.com">www.proximitymedia.com</a> ).
Voice and integrated response	CommerceTel ( <a href="http://www.commercetel.com">www.commercetel.com</a> ), SmartReply ( <a href="http://www.smartreply.com">www.smartreply.com</a> ), Jingle Networks ( <a href="http://www.jinglenetworks.com">www.jinglenetworks.com</a> ), Angel.com ( <a href="http://www.angel.com">www.angel.com</a> ), and VoiceCorp ( <a href="http://www.voice-corp.com">www.voice-corp.com</a> ).
Mobile Internet	iLoop Mobile ( <a href="http://www.iloopmobile.com">www.iloopmobile.com</a> ), Netbiscuits ( <a href="http://www.netbiscuits.com">www.netbiscuits.com</a> ), 2ergo ( <a href="http://www.2ergo.com">www.2ergo.com</a> ), Velti ( <a href="http://www.velt.com">www.velt.com</a> ), July Systems ( <a href="http://www.julysystems.com">www.julysystems.com</a> ), Iconmobile ( <a href="http://www.iconmobile.com">www.iconmobile.com</a> ), dotMobi ( <a href="http://www.dotmobi.mobi">www.dotmobi.mobi</a> ), and Mobile Interactive Group ( <a href="http://www.migcan.com">www.migcan.com</a> ). Check out mobiThinking ( <a href="http://www.mobithinking.com">www.mobithinking.com</a> ) for a great source of mobile Internet knowledge.
Installed applications	Nellymoser ( <a href="http://www.nellymoser.com">www.nellymoser.com</a> ), July Systems ( <a href="http://www.julysystems.com">www.julysystems.com</a> ), UI Evolution ( <a href="http://www.uievolution.com">www.uievolution.com</a> ), Mobile Distillery ( <a href="http://www.mobile-distillery.com">www.mobile-distillery.com</a> ), Digby ( <a href="http://www.digby.com">www.digby.com</a> ), Applicable Media ( <a href="http://www.applicablemedia.com">www.applicablemedia.com</a> ), Trailer Park ( <a href="http://www.trailerpark.com">www.trailerpark.com</a> ), Teleca ( <a href="http://www.teleca.com">www.teleca.com</a> ), Unity Mobile ( <a href="http://www.unitymobile.com">www.unitymobile.com</a> ), Catchwind ( <a href="http://www.catchwind.com">www.catchwind.com</a> ), The Hyperfactory ( <a href="http://www.hyperfactory.com">www.hyperfactory.com</a> ) and Usablenet ( <a href="http://www.usablenet.com">www.usablenet.com</a> ). You can also build applications in-house.
Content distributors and aggregators	SendMe ( <a href="http://www.sendme.com">www.sendme.com</a> ), MyThum ( <a href="http://www.mythum.com">www.mythum.com</a> ), Cellfish ( <a href="http://www.cellfish.com">www.cellfish.com</a> ), Snackable Media ( <a href="http://www.snackablemedia.com">www.snackablemedia.com</a> ), Flycell ( <a href="http://www.flycell.com">www.flycell.com</a> ), Playphone ( <a href="http://www.playphone.com">www.playphone.com</a> ), and Buongiorno ( <a href="http://www.buongiorno.com">www.buongiorno.com</a> ).



If you're going to do a lot of mobile marketing across a wide range of mobile media paths, you may consider working with a mobile application and services platform provider (also referred to as *platform provider*). The platform provider is a company that combines multiple mobile marketing capabilities into one solution. Some of the leading platform providers include Velti ([www.velt.com](http://www.velt.com)), 2ergo ([www.2ergo.com](http://www.2ergo.com)), iLoop Mobile ([www.iloopmobile.com](http://www.iloopmobile.com)), Tagga Media ([www.tagga.com](http://www.tagga.com)), MIG ([www.migcan.com](http://www.migcan.com)), and others.

- ✓ **Content owners and publishers:** *Content owners* are individuals and organizations that produce, hold the rights to, and sell content. For example, if you want to build a mobile application, you may need to get a license from a content owner or publisher to use its documents, presentations, images, audio, and other forms of static and rich, interactive, media. When a content owner controls the media channel that is used to deliver content to your customer, the content owner is considered a *publisher*. This is an important distinction when it comes to mobile advertising. Flip ahead to Chapter 10 for the details on mobile advertising.
- ✓ **Marketing and advertising agencies:** Marketing and advertising agencies are the companies that help organizations, content owners, and publishers market and promote their goods and services to customers. They provide marketing strategy, creative, branding, public relations, and other communication and marketing services to you and similar organizations. They help you develop and execute your overall marketing and specific mobile marketing programs.
- ✓ **Media providers:** Media providers give you access to traditional print, television, radio, outdoor media, packaging, point-of-sales, telephone, mobile, in-store, and other media where you can place a mobile call to action.
- ✓ **Enablers:** *Enablers* include trade associations, governments, standards bodies, and mobile device manufactures. Enablers are a critical, and often overlooked, part of the mobile marketing ecosystem. Including enablers helps you to stick to best-practices and avoid violating government regulations.
- ✓ **Registrars:** Registrars are the organizations that manage the numbers we use to send text messages and the domains for the Internet. Neustar ([www.neustar.com](http://www.neustar.com)) manages the Common Short Code registry in the United States ([www.usshortcodes.com](http://www.usshortcodes.com)), whereas dotMobi ([www.dotmobi.mobi/](http://www.dotmobi.mobi/)) is the top-level domain registrar for mobile Internet domains. (They also offer a number of developer tools and training programs.)
- ✓ **Governments:** Governments play a big part in the industry since they help define the laws that we all must adhere and help establish oversight for the industry. For more information on government regulations, see Chapter 3.



You should recognize that you may actually play many of the preceding roles during the course of executing a given strategy. Sometimes you're a customer; other times you're the marketer, content owner, brand, publisher, or even the application provider. This perspective helps you think about achieving your goals more broadly.

## *Understanding the Costs of Mobile Marketing*

Mobile marketing has up-front and variable costs that you need to be aware of before you execute your strategy. Planning for the costs of executing your plan allows you to determine how much money you'll make or how much money you're willing to risk to achieve a particular goal. This section explains what costs you need to include in your plan.

### *Calculating upfront mobile marketing costs*

Some costs for mobile marketing happen before you even begin a campaign. The following lists upfront costs and gives typical estimates so you can make sure to include them in your mobile marketing plan:

- ✓ **Strategy and resources:** You want to estimate the costs for your team, their training, and the development and maintenance of your strategy.
- ✓ **Mobile marking application fees:** These are the fees you pay to obtain the application logic that powers your mobile marketing programs. On average, depending on the functionality you license and the geography you're in, mobile marketing application fees range anywhere from \$500–\$15,000 per month.  
  
In addition to monthly fees, you should plan on paying initial account setup and training fees when you sign up with an application provider or connection aggregator. Fees may be higher if you're getting something very specialized. If you try to build the mobile marketing applications yourself, who knows? It could be quite expensive.
- ✓ **Connection aggregator fees:** These fees apply if you decide to go it alone and build out your own application logic. You need to bind your application to a connect aggregator, which costs you between \$1,000 and \$5,000 per month, depending on who you go with and the regions you want to cover. The connection aggregator fees are typically included in the mobile marketing application provider fees, which is another benefit of working with them. You can read more about connection aggregators above.
- ✓ **Common short code leases:** A common short code is a phone number that is only four to six digits long. If you're going to run any text messaging mobile marketing programs, you must lease a common short code. In the United States, short code leases cost anywhere from \$500–\$1,000



per month and they are billed quarterly. You may be able to rent a short code from your application provider or connection aggregator, but they'll probably charge you a similar fee. You can read more about short codes in Chapter 4.

## *Variable mobile marketing costs*

Depending on who you're working with, you may be quoted a single number for your entire mobile marketing program, for example, \$25,000 plus the traditional media and retail promotion fees, or you may get a breakdown of the costs. The following is a list of the variable costs in the typical mobile marketing program:

- ✓ **Program strategy development:** These can include all the activities needed to conceive of your campaign and lay out the plan.
- ✓ **Creative concept development:** These are all the design activities associated with your campaign.
- ✓ **Content licensing and creation:** These include licensing fees or design fees for any content you may use for the campaign, for example, images, ringtones, videos, news feeds, and so on.
- ✓ **Mobile marketing application:** These are the fees you pay for hosting and reporting on your campaign during the entire period of your campaign (that is, if you're not already licensing a platform or haven't built it yourself).
- ✓ **Tactical execution of program:** This includes creative, program certifications (as needed), technical implementation on mobile marketing application platform providers, legal costs (if you're running a sweepstakes program, for example), and any custom non-recurring software development that may be needed to tailor the application(s) to your specific campaign requirements.
- ✓ **Transactional items:** These include messaging traffic (SMS, MMS, e-mail), Internet and mobile Internet page views, advertising page views/click-throughs, content downloads, Interactive Voice Response (IVR) minutes, content royalties, images recognized, and so on.
- ✓ **Traditional media and retail channels:** These are the fees for promoting the program in any traditional media channels.



You can often reuse portions of your marketing strategy, marketing and campaign creative, and any custom software and content development for future programs. If you keep this in mind, you can save yourself quite a bit of money and time down the road.

## *Basing Your Strategy on Your Mobile Reach*

*Mobile reach* refers to how many people you can possibly engage through a particular mobile pathway. For example, compare Internet users to mobile phone users.

The potential reach of the Internet is measured by the 1.4 billion people who have access to a computer and an Internet connection. Although the potential reach for mobile phones is three times greater than the potential reach of Internet users — there are 3.1 billion unique mobile users (4.6 billion mobile subscriptions) at the time of this writing — the sheer number of mobile users out there doesn't tell you everything you need to know about your reach. Several technical and behavioral factors limit mobile reach, and failing to consider them could mean one or more of your goals are actually impossible to achieve.



If you're looking for mass market reach, you need to use the mobile pathways that have the technical ability to engage the largest audience, such as text messaging, voice, mobile Internet, and some multimedia services. On the other hand, if you're looking to reach a small niche market, you need only to consider the reach in a small sub-segment of the market, such as iPhone users, for example. The following sections show you the factors that affect your reach so you can be sure your objectives match up with your potential reach.

## *Dealing with interoperability*

*Interoperability* refers to whether a particular mobile path or capability, such as SMS or camera functions, can work across a mobile network and whether the particular capability is supported across the wide array of mobile enabled devices.

For example, SMS is supported on nearly 90% of all phones. Therefore, it is *interoperable* across nearly all major mobile operator networks. In contrast, Bluetooth is not installed on the majority of mobile devices. Its use as a marketing tool, while growing, is also hampered by differences in technical implementation and what is supported by a particular network or phone. For example, many BlackBerrys won't accept a content download initiated from a Bluetooth alert.

Interoperability is important, because in many cases you may not know what mobile carrier or network your audience is using and, especially for mass market marketing programs, you don't want to miss out on a big portion of the market because your program does not work on one or more mobile phones and devices or mobile carriers or networks your typical customer carries.

## A world full of mobile users

By the end of 2010, early 2011, estimates suggest that there will be more than 5 billion mobile subscriptions and more than 10 billion mobile-enabled devices. Keep in mind that there are only about 6.8 billion people on the planet! In fact, we're seeing 100 percent penetration for

mobile phone use in most developed countries and rapid growth in all developing countries. Mobile is the most cost-effective and reliable means of communication to deploy in developing regions.

## *Standing up to standards*

Standards consist of industry technical and business policies that have been established to ensure the reliability, repeatability, supportability and sustainability of a particular mobile channel, feature, or function you're looking to leverage. You need to work within two types of standards to build your mobile strategy:

- ✔ **Industry regulations and best practices:** Government regulations and industry best practices often lag behind what is technically possible. Chapter 3 provides detail on industry regulations and best practices.
- ✔ **Technology standards:** With certain mobile capabilities, like SMS, the technical standards are well understood, but with others, such as application development, they are not. Make sure you share a high-level view of your plans with your application providers to make sure the standards associated with the technology you leverage match the standards in your plan.

## *Adapting to mobile phone adoption*

When you're developing mobile marketing programs, you should keep in mind that there are thousands of phones on the market, all with different capabilities. For example, if you build a mobile application, but your customers have phones that support only text messaging, your programs are sure to fail. Your provider can also help you understand the types of phones your target market uses. They can also help detect the phones your customers are using in real time as your customer interacts with your campaign, and they can then tailor the mobile experience to the unique capability of your customer's device.

Figure 2-6 shows a list of the top mobile phones in the United States as of December 2009.

**Figure 2-6:**  
The top  
25 mobile  
handsets  
in use in  
the United  
States.

RIM BlackBerry Curve 8330 3,886,402 Q2 2008	Apple iPhone 3G 8GB 2,986,912 Q2 2008	LG enV2 VX9100 2,553,774 Q1 2008	LG enV3 VX9200 2,472,985 Q1 2008	LG enV Touch 2,311,548 Q1 2008	Apple iPhone 3G S 16GB 2,193,996 Q2 2008
LG VX8300 1,897,706 Q1 2008	RIM BlackBerry Storm 9530 (Global) 1,893,660 Q4 2008	Apple iPhone 3G 16GB 1,815,295 Q2 2008	Motorola RAZR V3 Silver 1,751,755 Q4 2004	LG VX5500 1,694,156 Q4 2008	LG Dare VX9700 1,678,618 Q1 2008
Samsung Snap SCH-U340 1,663,048 Q3 2008	Motorola RAZR V3m Silver 1,588,761 Q3 2005	Motorola W385 1,566,275 Q1 2007	LG VX5400 1,495,241 Q1 2007	Nokia 6085 1,464,463 Q4 2006	Motorola W375g 1,394,621 Q4 2006
Samsung Rant SPH-M540 1,387,641 Q3 2008	Motorola C139 1,313,794 Q4 2004	Apple iPhone 3G S 32GB 1,297,729 Q2 2008	LG Voyager VX10000 1,288,729 Q3 2007	LG enV2 VX9100 Maroon 1,213,798 Q2 2008	LG Xanon 1,176,669 Q4 2008

*Courtesy of comScore, Dec. 2010*

Before you decide to target people with a specific phone, you want to be sure your audience is broad enough to achieve your goals. For example, based on all the media attention, you may get the impression that everyone on the planet has an iPhone, or that they've replaced their iPhones with Google Androids, or similar smartphones. The reality is, however, that most people do not have smartphones.



The iPhone accounts for only 5% of the mobile phone market in the United States at the time of this writing, and its market share is significantly lower worldwide. If you bet your entire mobile marketing strategy on the fact that your customers have an iPhone, you miss 95% of the market. However, that 5% represents a niche market that can generate a lot of money for you and value for your customers, so you may want to target that audience specifically in your plan if the demographics of iPhone users make sense for your business.

The average consumer changes his phone about every 18–36 months, so assuming that every new phone released has some new capability, it will still take years for that capability to propagate through the market for it to even be considered a mass-market medium for marketers. Make sure your plans aren't ahead of the customer innovation adoption cycle.

## *Figuring on feature adoption*

Just because someone has the hottest, most capable new phone in existence, with the fastest Internet connection, doesn't mean that he knows how to or chooses to use all its features. If you've ever had a Swiss Army knife, think about how often you use the micro-saw. It's a cool thing to have, but you rarely, if ever use it.

Mobile phones are the same way. As of this writing, the majority of phones, about 90%, support text messaging, but only 60% of mobile subscribers on average use it. Nearly 75% of phones support the mobile Internet, but only 20% – 30% of us, on average, use it (in the U.S.).



Mobile device feature adoption varies significantly by geographic region. In most developing markets, very little rich media is used; consumers primarily use text messaging.

The moral of the story is that you need to consider mobile feature adoption into your plans as well. You can build a mobile marketing program on the hottest capability, and your market may have the right phone, but it may still not engage in the program for any number of reasons.

## *Evaluating ecosystem efficiencies*

Ecosystem efficiency is not always the most obvious factor to consider when it comes to mobile reach, but it is an important one. *Ecosystem efficiencies* refer to all the players within the value chain being responsible for and playing a part in the delivery of a mobile program and being able to efficiently perform their duties in an ongoing and sustainable fashion. By *sustainable*, we mean they can repeatedly and reliably deliver their services on time with high quality and can make payments on time to ensure each player can stay in business.



For mature programs like SMS, the market is relatively efficient, but for emerging capabilities, this is not always the case. In other words, if you're trying a new and emerging mobile capability, plan on something breaking and develop contingencies, with your partners, for how to handle it.

## *Profiling your customer*

Certain consumer profile factors significantly affect consumers' interest and ability to participate in mobile marketing programs. These factors include age, gender, ethnicity, household income, education, and the types of phones they use, to name just a handful of factors. Young people tend to text message more than older people, but this is leveling out. Leading research firms

like comScore ([www.comscore.com](http://www.comscore.com)), Nielsen ([www.nielsen.com](http://www.nielsen.com)), Insight Express ([www.insightexpress.com](http://www.insightexpress.com)) and Dynamic Logic ([www.dynamiclogic.com](http://www.dynamiclogic.com)) can help you better understand the various ways to segment user profiles. See the next section for more details on this point. You can also find out some great consumer behavior and profiling research (for free) at Pew Internet ([www.pewinternet.com](http://www.pewinternet.com)).

## *Reaching for geography*

Geography is a big mobile reach factor because not all mobile capabilities are uniformly available in each region around the world, nor will each mobile player be effective in every region around the world. Moreover, even if mobile capabilities are uniformly available, the execution process may be different, the business models may be different, the technical standards may be different, the laws may be different, and so on.

Take SMS, for example. Common short codes do not work across international borders. You need a different code for every country you want to conduct text messaging programs in. In some countries, you can lease a code. In others, you can only lease keywords (see Chapter 4 for more on SMS, common short codes, and keywords). They are also priced differently around the world. Luckily, however, the technology implementation is similar enough to generally be considered standard. Moreover, in developed countries like the United States, all the mobile media paths are increasingly being adopted by mobile consumers across various consumer profiles (refer to the section, “Profiling your customer,” earlier in this chapter). However, in countries like Brazil, China, and Russia, SMS usage is high (70–80%), whereas mobile video usage is low (1%–4%), as is the usage of other rich media mobile media paths like mobile Internet and applications.



Pay attention to the geography you want to run your programs in and work with you application providers and partners to ensure that you understand all the intricacies of each country you want to run a program in.

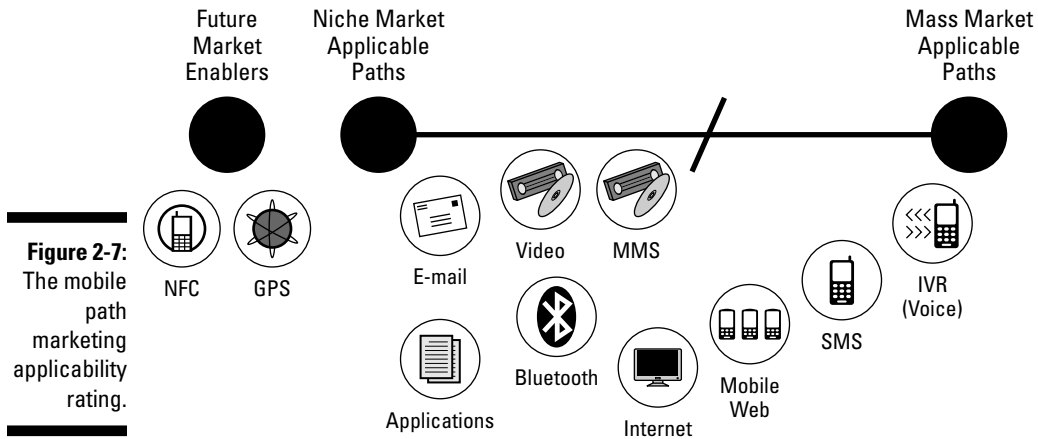
## *Determining the applicability of your strategy*

Taking into account all the variables we discuss in the previous sections, we can rate the mass-market applicability of each mobile path. Table 2-2 scores each mobile channel at a macro level and how it rates against the mass-marketing applicability criteria.

**Table 2-2 Mobile Path Marketing Applicability Rating**

	<i>Voice</i>	<i>SMS</i>	<i>MMS</i>	<i>E-mail</i>	<i>Mobile Internet</i>	<i>Proximity (Bluetooth and Wi-Fi)</i>	<i>Content</i>	<i>Applications</i>
Interoperability	X	X	X		X			
Standards	X	X	X	X	X			
Device adoption	X	X	X		X			
Device feature adoption	X	X						
Ecosystem and player health	X	X	X	X				
Customer profile	X	X	X					
Geography	X	X	X		X			
	7/7	7/7	6/7	2/7	4/7	0/7	0/7	0/7

Figure 2-7 depicts channel marketing applicability visually and shows that voice, SMS, and mobile Internet channel are the most applicable for mass-market programs, whereas all other channels are appropriate for niche marketing programs or simple experimentation at this point.



**Figure 2-7:** The mobile path marketing applicability rating.



Just because a particular mobile path is not applicable for mass market use does not mean that you should ignore it. Some channels, like the mobile Internet and video, are perfect for niche markets — that is, markets where you can be fairly assured that consumers have mobile devices capable of accessing the mobile Internet, have data plans (they're paying their wireless carriers to be able to use data services like mobile Internet on their phones), and know how to use the features. For instance, business market segments, iPhone users, and high-end niche consumer markets are perfectly suited for rich mobile experience, whereas the anonymous mass-market is not. You should rely on voice and text messaging until you better understand what your target market has in its hands and whether it knows how to use it.



Consider the mobile marketing mantra: *Global reach, regional relevance*. The mobile channel has become the world's most ubiquitous media channel, meaning that with mobile, your marketing programs can have global reach. However, what really matters for mobile marketing success is that you consider how all the factors discussed in this book differ within each region around the world. Every country and region around the world, even different regions within a country (like U.S. west coast versus east coast) has different consumer mobile adoption profiles. Even the processes and technologies for launching programs may differ. In other words, you must keep in mind that it is important for you to tailor your efforts in every region to run mobile marketing programs that are regionally relevant.



## *Including Customer Analysis in Your Strategy*

The technical ability for your customers to engage in your mobile marketing campaign isn't the only consideration you have to think about when determining your reach. You also need to consider whether your customers are even willing to engage. For example, younger audiences may be more willing to engage with your marketing if you include a mobile game or ring-tone download in your campaign. The key factors to evaluate customer preferences are

- ✓ Demographic data
- ✓ Psychographic data
- ✓ Preference data
- ✓ Behavioral data
- ✓ Situational context

The following sections show you which factors are most likely to affect your strategy so you can give them careful consideration when building a plan and setting goals.

### *Demographic factors that affect your strategy*

*Demographic factors* consist of the data points that detail a population's inherent characteristics. Keeping track of demographic factors is very important because demographic factors are often the greatest determinants of behavior. For example, targeting African-American or Hispanic customers isn't about tracking their heritage or skin color. Rather, you need to know things like the fact that customers from these ethnic groups tend to index higher in the use of all mobile services over other ethnicities, or that the types of phones they use are different from other ethnicities. The following is a list of demographic factors to consider:

- ✓ **Age:** Birth date or age range (such as 14–24)
- ✓ **Gender:** Male or female
- ✓ **Race/ethnicity:** Caucasian, African-American, Asian, Hispanic, biracial, multicultural, and so on

- ✓ **Religion:** Catholic, Muslim, atheist, and so on
- ✓ **Marital status:** Single, married, divorced, domestic partnership, and so on
- ✓ **Number of children:** Zero, one, two, three, and so on
- ✓ **Level of education:** None, high school, some college, college graduate, doctorate, life experience, and so on
- ✓ **Occupation:** Too many options to list individually (isn't that great?)
- ✓ **Income:** Monetary range (such as \$50,000–\$75,000 per year)
- ✓ **Nationality:** American, French, British, Chinese, and so on
- ✓ **Geography:** Residence, place of work (if you're a road warrior, American Airlines, seat B17, for example), and so on

## *Psychographic factors that affect your strategy*

*Psychographic factors* include the qualitative factors that measure aspects of a customer's life. They also influence a customer's willingness to participate in mobile marketing. You need to analyze the following factors to ensure that your promotional strategies appeal to the segments of the market you're targeting:

- ✓ **Lifestyle:** Frequent traveler, parent with young children, empty-nester, and so on
- ✓ **Attitudes:** Political and other views
- ✓ **Interests:** Hobbies and pastimes (such as music)
- ✓ **Purchasing motives:** Purchasing for self or as a gift, for entertainment, for utility, and so on
- ✓ **Frequency of product use:** Daily, weekly, as needed, and so on

## *Aligning your strategy to preferences*

*Preferences* are data volunteered by customers regarding their likes and dislikes, such as favorite food or least favorite music. Preference criteria you should consider include

- ✓ Days of the week and times when the customer will allow you to message or call him
- ✓ How many times the customer will allow you to contact him within a particular time frame (perhaps ten times a month, but no more than three times a week, for example)
- ✓ The customer's preferred mode of communication (mobile, e-mail, voice, instant messaging, and so on)
- ✓ The customer's preferred mobile device

By collecting information on a person's preferences and using it appropriately, you'll have a much better chance of meeting that customer's needs.

## *Planning for situational context*

Mobile is personal, and nothing is more personal than your customer's situational context. *Situational context* refers to someone's location and what's going on around him at the time. For example, is it hot or cold outside? Did his favorite sports team just win or lose? Is he moving? If so, at what speed? Is he on a hill, going up or down? Near home, or far away? Are friends nearby? Is he near his favorite restaurant? Is the stock market up or down? What is he reading, watching, or viewing? These questions are just the tip of the iceberg.

Increasingly, a number of mobile marketing solutions, with a customer's permission of course, are able to gather and use situational information, such as the customer's location, activity, the weather, and so on. With this info you can tailor the user interaction in real time to fit the context. Ask your application provider about this. Companies like Bookit ([www.bookit.com](http://www.bookit.com)) and iLoop Mobile ([www.iloopmobile.com](http://www.iloopmobile.com)) with its SmartSMS service are able to support this.



If you'd like to find out more about the differences in mobile behavior between different customer segments, you should check out the Carlson Marketing article "Bringing Mobile Segmentation to Life: Applying Customer Strategy to Build Stronger Relationships via Mobile Devices," which can be downloaded for free at

<http://carlsonmarketing.mediaroom.com/index.php?s=55&item=151>

In the article, Doug Rozen, Jeff Anulewicz, and Tom Senn identify eight mobile usage personas (Cord Hoards, Strictly Speaking, Utoolitarian, Lifeliners, Mobile Moths, Duty Callers, Funccessorizers, and Mavericks) and map the level to which each persona uses the mobile capabilities of talking, messaging, browsing, and downloading. This article provides a useful framework you can use to categorize your customers and to think about the types of mobile media they may use.



## Chapter 3

# Complying with Industry Regulations and Best Practices

---

### *In This Chapter*

- ▶ Developing a mobile marketing policy
  - ▶ Meeting the requirements of wireless carriers
  - ▶ Complying with laws and industry standards
- 

**M**obile marketing is governed by a combination of laws, of which many were drafted before much of today's technology existed, and new laws and regulations set by a combination of industry leaders, wireless carriers, and government agencies.

As with any industry, mobile marketing has its fair share of regulations and best practices that you need to follow. Doing so enables you to stay in compliance with the rules of the industry, protect the consumer, and help ensure the consumer has the best possible user experience.

*Regulations* refer to government mandated rules and laws that must be followed on both the state and federal levels in the United States or throughout a particular region or in other parts of the world. *Best practices* and *guidelines* are a compilation of accepted industry practices, wireless carrier policies, and regulatory guidance that have been agreed upon by representative members of a particular industry.

This chapter provides a road map for complying with the industry's best practices, guidelines, rules, *and* regulations so you can stay on the right side of the law and consumer preferences.

## Creating Your Company's Mobile Marketing Policy

Every company engaging in mobile marketing should have its own mobile marketing policy to ensure compliance with laws, regulations, and other standards in the marketplace. Your *mobile marketing policy* is a written document that outlines your company's position on key regulatory issues in mobile marketing and how you expect your employees and partners to react to these issues.

The following sections walk you through the components of a thorough policy that will give you the security and confidence you need anytime you run a mobile marketing campaign.

### *Adopting a code of conduct*

A *company code of conduct* is a collection of statements within a mobile marketing policy that clearly states what you believe to be right and wrong when it comes to mobile marketing and consumer engagement in general. Think of your code as all of the following rolled up into one:

- ✓ **A statement of your intent:** For example, "Our goal is to engage our customers through the mobile channel in a safe, easy, consumer-friendly way so that they ultimately will consider their mobile devices as a seamless and natural medium through which they can interact with our brand."
- ✓ **Your framework within which you engage consumers and protect their data:** For example, "We insure that consumers interact with our brand strictly on a voluntary basis and in a highly secure environment using state-of-the-art encryption and other security protocols to protect against inadvertent disclosure, misappropriation, and external attack."
- ✓ **Your treatise for complying with laws and regulations:** For example, "We commit ourselves to ensure that our mobile marketing programs are in compliance with current and future laws, regulations, and industry best practices. We will work with the governing bodies, our partners, and regulators to evaluate our program no less often than quarterly and will establish a communication policy to advise our employees, clients, and partners of any changes to our programs that are necessary to be in compliance with these regulations; moreover, we will promptly address any industry audits conducted by the mobile carriers, application store, or related parties."

The Mobile Marketing Association maintains a recommended code of conduct, shown in Figure 3-1, that can be downloaded at [www.mmaglobal.com/codeofconduct.pdf](http://www.mmaglobal.com/codeofconduct.pdf).

## Technology laws in the 1890s?

The gap between advancing technologies and laws is nothing new. A not-so-recent article in the *Harvard Law Review*, Vol. IV., No. 5, pp. 195-196, commented on the challenges that new technologies present to society and the protection of individuals:

"Recent inventions and business methods call attention to the next step which must be taken for the protection of the person, and for securing to the individual what Judge Cooley calls the right 'to be let alone.' . . . [New technologies] have invaded the

sacred precincts of private and domestic life. . . and the question whether our law will recognize and protect the right to privacy in this and other respects must soon come before our courts for consideration."

This law review article was published in December of 1890, and the *new technologies* in proliferation were "instantaneous photographs and newspaper enterprises." The mobile marketing channel is full of new technology, but the impact on legal and regulatory issues is not new.

**Figure 3-1:**  
The Mobile  
Marketing  
Association's  
Global Code  
of Conduct  
document.



Courtesy of the Mobile Marketing Association

## *Publishing your privacy policy*

A privacy policy is absolutely critical if you want to collect information from consumers. Although privacy policies are not actually required in the U.S., consumers expect them when your business is engaged in electronic commerce and collecting consumer data. Not only does a privacy policy help to inform and please consumers, but you also save yourself a lot of legal headaches later if you can demonstrate your adherence to a publicly available privacy policy if someone complains about your privacy practices.

Your mobile marketing policy should clearly spell out how your company plans to

- ✔ Obtain permission when you want to engage someone in your mobile marketing programs.
- ✔ Keep a record of someone's permission after you obtain it.



You should take the security of consumers' information very seriously. If you don't, you may ruin any possible future relationship with a consumer at the very least. At worst, you could pay a severe fine and even end up in jail (especially in Europe, which has incredibly stringent consumer protection laws).

Typical privacy policies include five things:

- ✔ **A list of the categories of information collected:** This isn't just names, addresses, or phone numbers. Mobile devices also have the ability to collect less obvious information such as location data and behavioral data. Make sure you include all forms of information collection and tracking in your policy.
- ✔ **A list of the categories of third parties with whom data is shared:** As a best practice, you should not share personally identifiable consumer data with any third parties unless it's absolutely necessary to carry out a legitimate business practice. For example, if you're using a third party to administer digital coupon delivery to consumers, you need to share information about your consumers' mobile devices with that third party.
- ✔ **A description of the process (if any) by which consumers can review and request changes to their collected information:** A common method is to provide an e-mail or postal address for consumers to send requests for changing or deleting information you've collected about them.
- ✔ **A description of the process by which the operator notifies consumers of material changes to the operator's privacy policy:** An acceptable policy is simply to state in your policy that you may make material changes from time to time and that consumers should periodically check back for the most up-to-date terms. If you anticipate making significant changes to your privacy policy, you can send an e-mail to all those whose e-mail addresses you've collected pursuant to the policy to notify them of the change.



- ✓ **The effective date of the privacy policy:** Most privacy policies begin with “Last revised on [date].”

Having a privacy statement doesn’t do much good if you don’t follow it. In fact, not following a documented privacy policy can get you into more legal trouble than not having any policy at all. You should post your policy anywhere you collect consumer information, such as a Web site or through the mobile channel. Figure 3-2 shows an example from a Web site by ePrize, the world leader in interactive promotions. If you’ve never drafted a privacy policy before, don’t start now. We strongly encourage you to seek the advice of a legal professional regarding the content of your policy and where to post it.

To find out more about privacy statements, go to <http://mmaglobal.com/privacy-policy>.

**Figure 3-2:**  
Publish a  
link to your  
privacy  
policy  
wherever  
you collect  
information.



Terms of Use link may also  
be called Privacy Policy.

Courtesy of SiteMinder

## *Stating your permission practices*

The use of consumer information and most forms of outbound mobile communications require opt-in permission from the recipient before they are legal or permitted by mobile carriers. Your mobile marketing policy should include a statement of your permission practices so you can ensure that your information is usable and your messages will be deliverable and legal.

You must obtain prior opt-in permission from consumers before you can initiate engagement on their mobile devices. The following are examples of cases where opt-in permission is needed and examples of how opt-in might be applied in the interest of the best consumer disclosure.

- ✓ To start, the marketing material you use to invite the consumer to engage in your mobile program must contain opt-in information about the cost of engagement. For example, adding *Std Txt&Data rates may apply* (which stands for *Standard text and data rates may apply*) as part of the legal information near the call to action to participate means that the consumer would be charged a fee by their carrier for all text messaging, multimedia messaging, and data — application downloads, Web site views, and so on — in accordance with the contract they've entered into with their mobile carrier. There are even more detailed versions of this language as detailed in the Mobile Marketing Association Consumer Best Practices ([www.mmaglobal.com/bestpractices.pdf](http://www.mmaglobal.com/bestpractices.pdf)).
- ✓ Sending text messages on an ongoing basis. Your permission statement needs to outline the steps for obtaining prior permission. For example, your statement might require new customers to reply “yes” to all your text message prompts before they can receive future messages, as shown in Figure 3-3.
- ✓ Charging for content or services on a phone.
- ✓ Asking for donations through mobile devices. Your statement should detail the process for confirming present and future donations. For example, Figure 3-4 shows how making a \$10 donation to support Haiti relief efforts requires the donor to reply “yes” to a confirmation message, even though the donation request was initiated by the prospective donor by sending a text message.



**Figure 3-3:**  
Text mes-  
saging  
requires  
prior per-  
mission  
from  
recipients.

**Figure 3-4:**  
Mobile  
donations  
require a  
confirmation  
response  
from the  
donor.



✓ Tracking physical location. Some mobile applications can serve pertinent information to consumers based on their physical location. Before activating any location usage application, consumers must be prompted with the specific request for permission. Your statement should include a process for gaining permission, such as a check box or online form that asks users if they want to allow you to use their location. You request this permission in different ways depending on your venue:

- For a text messaging program, send a message that says, “Please reply yes to this message to share your location information.”
- For a mobile application, a pop-up appears asking, “This application would like to use your current location.” The pop-up includes two options to click: OK and Don’t Allow.
- In the mobile Web context, include a link that states, “Please click this link to give permission to use your location.”

## *Securing and managing consumer data*

Personal information can take many forms, including a consumer’s mobile phone number, address, health and financial data, current location, and behavioral data. In marketing, personal information is divided into two classes:

- ✓ **Personally identifiable information (PII):** PII is any and all information that can be used to identify a person.
- ✓ **Non-personally identifiable information (non-PII):** Non-PII is information collected through the course of the marketing process, such as clicks on a Web site, that can’t immediately be linked to a specific person.

## California's Online Privacy Protection Act

California is the only state that actually requires businesses collecting PII from California residents to have and post a privacy policy. The Online Privacy Protection Act has quite a few

requirements, so if your business collects PII from residents, you should definitely consult with an attorney knowledgeable in this area.

Both PII and non-PII are collected in mobile marketing interactions. The information may simply be a person's phone number, as when someone text messages into a program, or it may include additional details such as age, name, and address. The information may be provided by the consumer during the course of his interaction with you or obtained later by combining data from multiple public and private data sources.



Regardless of how the information is collected, you *must* protect and safeguard all information that you collect during your interactions with consumers. You should collect only information that you really need. Frankly, why assume the liability of having it if you don't have to?

Your customer data is very valuable to your company, but keep in mind that it's even more valuable to identity thieves. These days, governments not only go after those who steal it. They also go after companies who allowed the data to be stolen.



Forty-five states, the District of Columbia, Puerto Rico, and the U. S. Virgin Islands have laws requiring notification of security breaches involving personal information. A number of these laws require that you store PII in encrypted format; the manner in which you store data could violate these laws even if you haven't had an actual breach.

As a general rule, if you include the following four steps in your mobile marketing policy and adhere to them, you'll usually be in compliance with data security laws:

- ✓ **Collect only data that you absolutely need:** If you collect your customers' Social Security numbers, but don't do anything with them, you've created unnecessary risk.
- ✓ **Limit internal access to customer data to only those people who absolutely need it:** Some businesses give everyone in their IT department access to all information out of convenience in case someone from IT has to fix something. But if you allow an employee who sets up e-mail accounts for new employees to have access to a customer's payment history, you've created unnecessary risk.

- ✔ **Store data in highly secure form:** Encryption has become standard of care.
- ✔ **As soon as you're done with a customer's data and have no further need for it, destroy it:** If you retain customers' data after they have closed their accounts, you've created unnecessary risk.

After you have a plan for storing your data, you should document your data management policy and make sure it spells out the logistics of all the concerns we mentioned previously. Your data management policy should answer questions such as, where is the data, how is it secured, who has access to it, what are the protocols for accessing, retaining, or deleting it, and so on.



If you hire a third party agency to manage the engagement and collect data, ensure an agreement is in place regarding the PII obtained and stored on your behalf. It should be managed, shared, and disposed of based on the security you require. It's wise not to make assumptions here; an agency might have a different viewpoint on this issue that is not in accordance with your policies.

## *Creating policies for special programs*

Some mobile marketing campaigns have the potential to create unique legal and regulatory implications, so you need to address them individually in your mobile marketing policy. These special programs include

- ✔ **Winner data in prize promotions:** Talk with your attorney to make sure your policy addresses state and local laws in addition to national laws for contests and promotions. (You can read more about laws for contests and promotions a little later in this chapter in the section called, "Complying with sweepstakes rules.")
- ✔ **Incentives:** If you're using gifts, prizes, or other incentives to engage your customers, make sure your policy complies with local, state, and federal laws. These laws can be extremely complicated; consult your attorney or a specialist firm like ePrize ([www.eprize.com](http://www.eprize.com)).
- ✔ **Social media:** If your business has a social media presence, give some thought to whether your policies or procedures should treat those who interact through their mobile devices differently from those who access through laptops or desktops. For example, if you want to use mobile social media technology to utilize consumers' location data, you may run into legal issues with publically posting the physical location of individuals. Allowing the general public to know where specific individuals are (or that they aren't home right now) can present safety and privacy concerns.



Special program policies are often specific to your business, industry, or local jurisdiction. Get help from your attorney before you address them in your policy or in practice.

## *Complying with Trade Association Guidelines*

Following industry guidelines is always important. Luckily, even though the mobile marketing industry is young, we have some great practices to follow. From the early days of the industry, industry leaders quickly realized that if they didn't regulate themselves in a responsible, consumer-friendly manner, governments would do it for them in a way that may stymie innovation and their ability to deliver customer value. (Don't get us wrong: Laws are good and we have to protect the customer, but self-regulation should take the lead.)

As a result, a number of influential trade organizations and documented best practices, guidelines, and policies have sprung up. You need to follow these guidelines if you want to be effective marketing through mobile channels. The following sections show you what you need to know.

### *Getting to know the influencers*

There are a number of trade associations whose guidelines and best practices are well respected when it comes to mobile marketing. It's a good idea to become familiar with each association and their guidelines:

- ✓ **The Mobile Marketing Association (MMA):** The MMA is the leading worldwide trade organization whose members include agencies, advertisers, hand-held device manufacturers, carriers and operators, retailers, software providers and service providers, as well as any company focused on the potential of marketing through and with mobile devices. The MMA has established several standards and updates them often with notice to their members. For example, the MMA recently published Global Mobile Advertising Guidelines and highlighted the fact on their Web site, shown in Figure 3-5. The MMA's Consumer Best Practices Guidelines ([www.mmaglobal.com/bestpractices.pdf](http://www.mmaglobal.com/bestpractices.pdf)) is a good place to start learning about accepted industry practices, wireless carrier policies, and regulatory guidelines that have been agreed on by representative member companies from all parts of the industry. Check back at their Web site every six months or so for updates.

**Figure 3-5:**  
The Mobile  
Marketing  
Association  
advertises  
policy  
updates to  
members.



- ✓ **The Direct Marketing Association (DMA):** The DMA is a leading trade organization in both the United States and the United Kingdom that focuses on direct marketing practices, including mobile marketing. In 2009, the DMA included a mobile marketing section in its Guidelines for Ethical Business Practice guidelines ([www.dmaresponsibility.org/Guidelines/](http://www.dmaresponsibility.org/Guidelines/)), which are designed to help you execute your mobile marketing programs properly.
- ✓ **CTIA — The Wireless Association:** The CTIA is an international non-profit membership organization that has represented the wireless communications industry. Its membership includes wireless carriers and their suppliers, as well as providers and manufacturers of wireless data services and products. Participating wireless carriers, in conjunction with CTIA, have voluntarily adopted the Wireless Carrier Content Classification & Internet Access Control Guidelines. The Guidelines were developed along with an industry-approved Classification Criteria. This is another critical resource you should consult if you want to market to consumers through the mobile channel.
- ✓ **Interactive Advertising Bureau (IAB):** The IAB is an organization that includes more than 375 leading media and technology companies who are responsible for selling 86% of the online advertising in the United States. Among the IAB's core objectives are sharing best practices and educating industry members in responsible marketing methods to help fend off adverse governmental legislation and regulation. The IAB mobile committee produces best practices and mobile advertising guidelines, which are available at [www.iab.net/iab\\_products\\_and\\_industry\\_services/1421/1488/mobileplatform](http://www.iab.net/iab_products_and_industry_services/1421/1488/mobileplatform).

- ✓ **Groupe Speciale Mobile Association (GSMA):** The GSMA is a global association spanning 219 countries and uniting nearly 800 of the world's mobile operators, as well as more than 200 companies in the broader mobile ecosystem, including handset makers, software companies, equipment providers, Internet companies, and media and entertainment organizations. This organization is focused on innovating, incubating, and creating new opportunities for its membership and the growth of the mobile communications industry. Information on the GSMA is available at [www.gsma.com/](http://www.gsma.com/).



In addition to the five most influential trade associations, an increasing number of guidelines and best practices are set by installed application providers. These guidelines aren't set by an association, but rather are set by the application stores. For example, the Apple store requires that any iPhone application that offers location-based services must notify and obtain consent from an individual before his location data is collected, transmitted, or otherwise used by the application. Make sure you are aware of any and all individual provider guidelines before going through the trouble of building an application, Web site, or other program involving a partner.

## *Embracing industry self-regulation*

Many of the industry association guidelines are self-regulated. It's a good idea to be involved in the process and not just become a passive bystander. Join and support the organizations that form and publish these guidelines.

Also, keep in mind that industry regulations are not law, but many of the regulations are set according to known consumer behaviors and issues that attracted government involvement in the past. If you don't follow them, you might not only risk being kicked out of an association or being denied access, but you might also risk consumer backlash, lawsuits, or even getting the attention of lawmakers who enact new legislation to keep you and others from doing similar things. Police yourself, rather than having someone do it for you.

In many instances, abiding by industry guidelines is not optional. For example, in the U.S., the wireless carriers won't work with anyone who doesn't adhere to the MMA Consumer Best Practice Guidelines. If you're running a mobile marketing campaign that violates their guidelines, the wireless carriers shut down your program by deactivating your short code. In some situations, companies won't even do business with you if you're not a member of or certified by a particular trade organization.



## Complying with U.S. Government Regulations

The U.S. government and individual states have managed to pass a few laws specifying what you can and cannot do with mobile marketing. The following sections highlight key laws, statutes, and regulatory activities that intersect with mobile marketing. As with all legal analysis, consult with your attorney before setting your company policies or taking any action with legal implications.

### *Steering clear of mobile spam*

*Mobile spam* is unsolicited, unwanted communications in the form of e-mail, text messages, multimedia messages, and so on. As you might imagine by looking at your e-mail inbox or junk folder, spam is one of the more heavily regulated activities. Different laws apply, depending on the specific technology used to send communications. Most communication practices fall under at least one of four federal statutes:

- ✓ **CAN-SPAM:** CAN-SPAM is a U.S. federal statute that regulates the senders of commercial electronic mail. Electronic mail messages regulated under CAN-SPAM include e-mail and other electronic messages sent through social networking sites, but do not include text messages. (Text messages are governed by the TCPA discussed in the following bullet point.) In order to comply with CAN-SPAM, check the current law at [ftc.gov/spam](http://ftc.gov/spam). If you violate any of the CAN-SPAM laws, the U.S. Federal Trade Commission (FTC) can prosecute you.

In addition to FTC involvement in spam, the Federal Communications Commission (FCC) has imposed a ban on sending unwanted commercial e-mail messages to wireless devices if the e-mail address receiving the e-mail includes a wireless domain e-mail address listed at [www.fcc.gov/cgb/policy/DomainNameDownload.html](http://www.fcc.gov/cgb/policy/DomainNameDownload.html). This is a special rule designed to prohibit marketers from sending commercial e-mail to mobile devices.

- ✓ **Telephone Consumer Protection Act (TCPA):** The TCPA was passed by Congress in 1991 — long before SMS technology existed. The TCPA generally applies to telephone solicitations and other calls made to phone numbers, including wireless numbers. The FCC has noted that the law encompasses both voice calls and text calls to wireless numbers, including SMS messages. One of the things the TCPA prohibits is the use of auto-dialers — computers that dial phone numbers — without prior express consent from the owner of the mobile number or account. Without getting into all the legal mumbo jumbo, the TCPA's application to text messages gets pretty convoluted. To be on the safe side, don't send unsolicited text messages to anyone.



The best practice with any of the preceding regulations is to make sure you get consumers' consent before you contact them through mobile channels.

- ✔ **Telephone Sales Rule (TSR):** The FTC issued the Telephone Sales Rule and has revised it on several occasions to update its applicability to the evolving climate of the mobile channel. The TSR consists of four general requirements for telemarketers:
- ✔ **National Do Not Call Registry:** On October 1, 2003, the TSR gave consumers a choice about receiving most telemarketing calls by establishing the National Do Not Call Registry (see Figure 3-6). Telephone solicitors are required to ensure that they do not make telephone solicitation calls to any number listed not only on the National Do Not Call list, but also various lists containing those numbers that have changed from landline to wireless accounts and numbers that have been set aside for wireless service. Consumers can register their home and mobile phone numbers with the Do Not Call Registry at [www.donotcall.gov](http://www.donotcall.gov). Most marketers are forbidden to place telemarketing calls to any phone number listed in the registry, but some exceptions exist, such as political organizations, charities, telephone surveyors, and companies that have pre-established business relationships with a consumer. Marketers are required to check the registry at least once every 31 days to clean their internal lists. Text messaging and e-mail also fall under the umbrella of the Do Not Call Registry.

**Figure 3-6:** The National Do Not Call Registry governs marketing to mobile phones.



- ✓ **Standards for telemarketers:** The TSR prohibits deceptive and abusive telemarketing acts and practices and sets forth standards of conduct for telemarketing calls:
  - Calling times are restricted to the hours between 8 a.m. and 9 p.m. specific to the time zone you are calling, such as Eastern Standard Time (EST).
  - Telemarketers must promptly tell you the identity of the seller or charitable organization and that the call is a sales call or a charitable solicitation.
  - Telemarketers must disclose all material information about the goods or services they are offering and the terms of the sale. They are prohibited from lying about any terms of their offer.
- ✓ **Predictive dialers:** A *predictive dialer* is a computerized dialing system that automatically calls a batch of phone numbers within a given range. Telemarketers who use predictive dialers must connect the call to a live representative within two seconds of the consumer's completed greeting. If they don't, the call is considered abandoned even if it's answered by a live representative after the two seconds. Abandoned calls are generally prohibited, meaning you cannot keep someone waiting on a line longer than two seconds before they are connected to a live attendant.
- ✓ **Caller-ID:** To be in compliance with the Caller-ID component of the TSR, a marketer may not block Caller-ID and must list a company name and telephone number that can be called by the consumer for company Do Not Call requests. The callback number must be answered with the same company name listed on the Caller-ID.



All the rules and requirements surrounding contacting wireless devices seem like a virtual landmine. The DMA has come out with a very useful Wireless Marketing Compliance chart that helps you navigate through the rules and requirements surrounding contacting wireless devices. Check it out at [www.dmaresponsibility.org/WirelessChart/](http://www.dmaresponsibility.org/WirelessChart/).

## *Regulations governing automated voice campaigns*

The regulations involving outbound automated voice campaigns are burdensome and important. At the federal level in the United States, the FTC and the FCC each has a series of regulations that are evolving. More than half of the states have their own voice regulations, and several of the state and federal courts have conflicting rules about pre-emption. In other words, are marketers supposed to follow federal or state laws when they conflict? You have to make your best decision among conflicting rules.

Some of the state laws are funny. For example, in Louisiana you cannot push calls on state holidays, even Creole holidays that the other 49 states have never heard of. The laws and precedents also change very frequently, so check with an attorney that specializes in telemarketing and IVR (Integrative Voice Response, or an automated call attendant) before executing your campaign. A promotional campaign is anything that attempts to sell or upsell something, even “sale notifications” and product warranty sales to consumers who have just purchased a new product. Upselling refers to the practice of inviting a client to purchase additional products and services. In the next few sections, we cover the main regulations you should be aware of before you launch a voice campaign.

### ***Express Consent***

The federal laws are broken down into general categories. If the call is promotional in nature, the FTC requires Express Consent, which is a customer’s signature (digital or wet) on an opt-in form.

### ***Call Introduction***

The FTC law also requires the script to immediately state who is calling, the purpose of the call, and how to opt-out immediately.

### ***Immediate Opt-Out***

The immediate opt-out requirement is *one-button opt-out*. Generally, all the customer has to do is press a certain number to opt-out. The marketer must immediately allow the customer to opt-out, with no questions or delays.

### ***Toll-Free CallBack***

For those messages that are delivered to answering machines, every out-bound IVR must include a toll-free opt-out number for consumers to call.

### ***Caller-ID***

With the right technology, you can have your caller-ID say anything and even change the number from which you are calling; however, this practice is illegal in push-based IVR programs, that is, IVR systems that initiate a phone call and then walk the answering party through a series of automated prompts).

### ***Opt-Out***

When someone opts-out, don’t call them again until they opt-in on their own. Besides being obvious good sense, it is the law.

### ***Message Length***

Although the length of a message is not regulated, try to keep them short. We’ve observed that messages more than 45 seconds long on an answering machine are deleted, and messages more than 20 seconds long on a “live ear delivery” are hung up on.

### ***Do Not Call***

In October 2003, the U.S. implemented the Do Not Call regulations, which came with a Do Not Call Registry of consumers who do not want to receive calls from telemarketers. With the new Express Consent laws, prerecorded IVR push messages can only be delivered to people who have opted-in, but their opt-in takes precedent over their do-not-call status. In other words, a consumer who is registered on the Do Not Call Registry but later provides you their express consent to receive calls from you is eligible to receive those calls.

### ***Cost of a Violation***

At the time of this writing, the cost for violating federal laws is \$16,000 *per phone call* in violation. If you placed 1,000,000 violating phone calls, you're looking at \$16,000,000,000 in fines! Be cautious.



Voice campaigns where people opt-in to receive information instead of promotions are often called *informational campaigns*. These include messages such as flight delay announcements, prescription refills, and snow-day alerts. However, adding anything promotional in the content (such as, “and when you're refilling your prescription, you can save 5% on groceries”) makes the call a promotional campaign. Informational campaigns have the same rules as promotion campaigns, except for the elimination of Express Consent.

Informational calls, according to federal law, can only be sent to customers who have an existing business relationship (EBR). Each state may be different, so check it out. Generally, an EBR is defined as a customer having made a purchase in the prior 18 months. The requirement of Express Consent is eliminated for informational calls, but if you can capture Express Consent, it doesn't hurt.

## ***Safeguarding the privacy of children***

Children (those 13 years old and younger) use mobile phones too, and you must be very careful when marketing to them. In the United States, rules for marketing to children are clearly spelled out in the Children's Online Privacy Protection Act of 1998 (COPPA), which you can find at [www.ftc.gov/ogc/coppa1.htm](http://www.ftc.gov/ogc/coppa1.htm). The act clearly outlines how and when you can engage children, as well as rules about gathering their personal information and gaining parental consent.



In addition to COPPA, you should pay close attention to the Cross Carrier Standards section of the Mobile Marketing Association's U. S. Consumer Best Practices Guidelines ([www.mmaglobal.com/bestpractices.pdf](http://www.mmaglobal.com/bestpractices.pdf)), which details the industry-accepted methods for marketing to children via the mobile channel.

## Puerto Rico Revised Sweepstakes Regulations

In November 2009, Puerto Rico became the first U. S. jurisdiction to pass a law that expressly excluded standard text messaging charges from the definition of “consideration” for games of chance. That means that in Puerto Rico, you

can run a game of chance in which the only way to enter is through text messaging without having to include a free alternate method of entry.

## *Complying with sweepstakes rules*

A chance to win a game or sweepstakes is an extremely effective incentive for collecting consumer permission, information, or participation in a marketing program. Sweepstakes and contests have strict rules that must be followed or you may face fines and even imprisonment.

One of the cardinal rules in games of chance is that you cannot require consideration in order to enter. *Consideration* is the legal term for some sort of payment or exchange of value. If consumers have to pay consideration to enter a game of chance, that constitutes a lottery — and lotteries are illegal unless they’re run by a government. That’s why you always see the “no purchase necessary” clause in any ad for a sweepstakes. Even when the *primary* method of entry is purchasing a product, there’s always a free method of entry available for people who don’t want to make a purchase.

Running a game of chance through the mobile channel presents an interesting problem when it comes to consideration. For example, say you decide to run a contest where consumers text the keyword “PLAY” to the short code 77493 (PRIZE) to find out whether they have won. Because sending a text message costs most people money — anywhere from 10 to 20 cents depending on the carrier — you need to provide a free method of entry.



While there is debate over whether standard text messaging charges constitute consideration in games of chance, premium text messaging (PSMS) charges most definitely *do* constitute consideration. If you want to run a promotion in which consumers incur premium text messaging charges, you absolutely must include a free alternate method of entry.



You must consult your attorney to make sure your mobile contest is legally compliant because the laws surrounding consideration in the mobile channel can be downright backwards. For example, some regulators consider a text message to be consideration, but consider a mail-in entry to be a free method for entering a contest. The government apparently thinks that a 20-cent text is not free, whereas a 44-cent stamp stuck to an envelope is free. Don’t expect common sense, or common cents, to prevail when you’re planning a contest or sweepstakes!

## *Complying with Non-U.S. Government Regulations*

Mobile marketing is a global phenomenon. In fact, mobile usage penetration is deeper outside of the U.S., especially in countries that do not have high-speed broadband Internet access infrastructure in place. Although the MMA guidelines apply universally regarding standard of care (that is, the generally accepted and reasonable means of engaging a consumer), every country has its own rules, regulations, and cultural sensitivities regarding all the issues listed in this chapter. For instance, the European Union Directive 2002/58/EC explicitly prohibits spam, as do other regional directives and industry best practices and guidelines.

Each directive has different rules about what constitutes spam. The mobile channel is recognized as requiring explicit consent from mobile subscribers before you can message them, for example, but with e-mail, typical regulations allow you to e-mail anyone without their consent as long as you provide a clear and conspicuous way of opting out (telling you not to contact them).



Don't assume one set of regulations applies to all directives. Mobile, e-mail, or voice-marketing regulations may or may not vary; be sure to check for specifics before you launch your campaign!



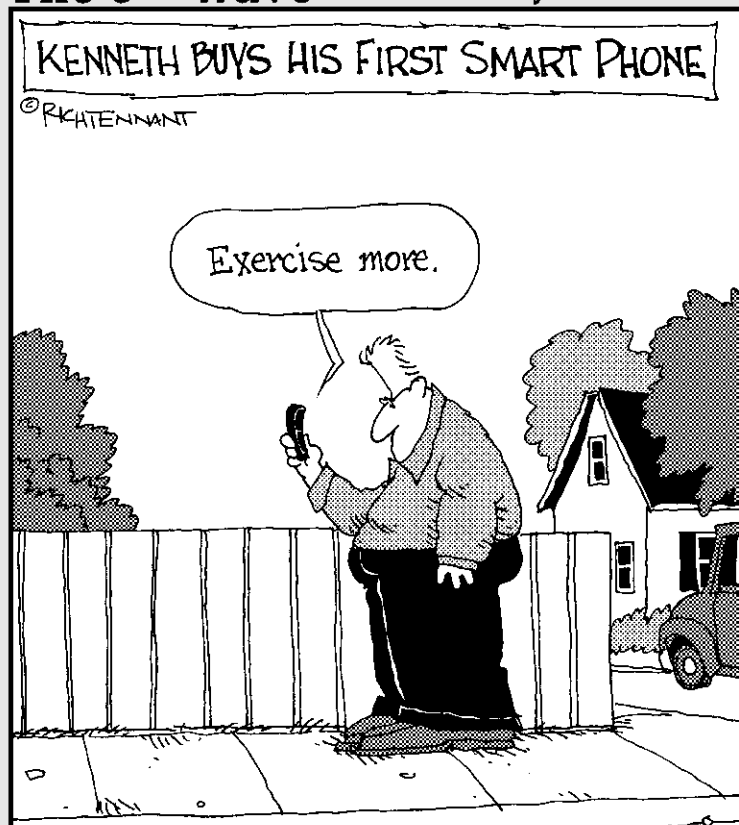


# Part II

# Executing Direct Mobile Marketing Campaigns

The 5<sup>th</sup> Wave

By Rich Tennant



## *In this part . . .*

**D**irect mobile marketing campaigns involve messages sent directly to consumers, and include text messaging, multimedia messaging, and mobile e-mail. Messaging to mobile devices requires you to think about the features of the mobile devices involved and the context of the person reading the message, as well as more technical aspects such as carrier approval for your messaging.

Chapter 4 tells you how to get ready for text messaging by obtaining a common short code and getting carrier approval for your campaigns. Chapter 5 helps you execute common text messaging campaigns such as opt-ins, alerts, coupons, and other promotions.

Chapter 6 shows you how to add media such as pictures, sound, and motion to your text messages through multimedia messaging. Chapter 7 helps you adapt your e-mail marketing for mobile devices by showing you how to format your e-mails for mobile screens and how to collect e-mail addresses through mobile channels.

## Chapter 4

# Getting Ready for a Text Messaging Campaign

### *In This Chapter*

- ▶ Getting approval for your text messaging campaigns
- ▶ Obtaining and using common short codes
- ▶ Setting up a text messaging platform and database
- ▶ Selecting an application provider to enable your campaigns

**T**ext messaging, also referred to as Short Message Service (SMS), or just texting, is an incredibly versatile way to send a message to nearly any mobile phone on the planet. About 95% of all phones are text messaging enabled. An SMS is a 160-character alphanumeric digital message that can be sent to and from a mobile phone. *Alphanumeric* means that it consists of letters (upper- and lowercase), numbers and symbols (such as 1, 2, 3, 4, !, @, #, or \$), and spaces. SMS messages can be exchanged between mobile phones and SMS-enabled devices, digital displays (like a JumboTron at a sports arena or conference), blogs, and social networking sites like Facebook or Twitter.

Text messaging is more than just a person-to-person channel; text messaging is the cornerstone of mobile marketing. You can deliver content, news, and weather; launch voting and polling programs; engage consumers in promotional offers and sweepstakes; recruit volunteers; deliver coupons and customer care alerts; and so much more.

In this chapter, we show you how to get your text messaging program organized and what you need to get started. We review how to select your text messaging partner and set up your database. We also show you how to register common short codes and tell you how to create a user flow and get your text messaging campaigns approved by carriers (U.S. carriers, at least). If you're already a pro at setting up a text messaging platform, flip ahead to Chapter 5, where we show you how to create and launch the most common types of text messaging campaigns.

## Understanding SMS Basics

Launching a text messaging program takes more planning than you might expect. In order to get started launching and running text messaging programs, you need to have the following in place:

- ✓ A marketing strategy and plan that guides your decisions on what to send out. (You can read more about marketing objectives in Chapter 2.)
- ✓ A text messaging application platform that manages all the text interactions between you and individual mobile subscribers.
- ✓ A common short code, which is a shortened phone number used for addressing commercial text messages (see the section, “Understanding Common Short Codes,” later in this chapter).
- ✓ Carrier approval “certification” for your campaigns (in the United States, all text messaging programs must be approved by the mobile operators; however, this requirement differs by country. You’ll want to talk to local application providers in each country for help).
- ✓ A marketing program to promote your text messaging programs; you can’t send text messages to people until they opt-in to receive them, and they won’t know about your text messaging programs unless you advertise or promote the program to them through your mobile-enhanced traditional marketing channels.

This section guides you through the process of laying out your text messaging plans and the flow of your messaging to give you a foundation upon which to start building a platform. We show you how to add the other elements to your platform later in this chapter.

## Understanding the flow of text messaging

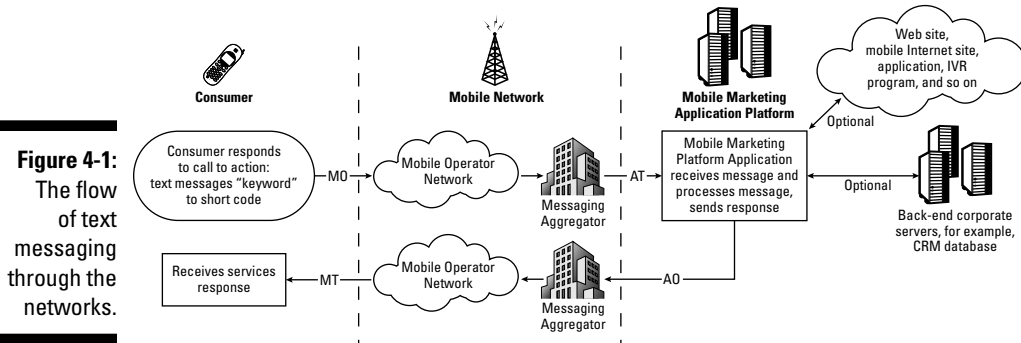
Text messaging programs have a very specific flow to them that you must understand to get approval for your campaigns and to adapt the key capabilities of your mobile marketing application provider’s platform in a logical way.

Text messaging flows involve four types of text messages:

- ✓ A *mobile originated message* (MO) is a text message that comes from your customer, the mobile user.
- ✓ An *application terminated message* (AT) is a text message that is received and processed or *terminated* by a mobile marketing application.
- ✓ An *application originated message* (AO) is a text message that is sent by a mobile marketing application to your customer, the mobile user.
- ✓ A *mobile terminated message* (MT) is a text message that is received by your customer, the mobile user.



Figure 4-1 shows you how text messaging flows between you and the mobile user. Notice how the message can flow from the consumer (a mobile originated message), through the mobile operator networks, to the application platform (as an application terminated message), and back to the consumer (as an application originated message in response to the mobile originated message).



## Trillions and trillions served

Text messaging is an extremely popular service that caught on in the United States via TV shows such as *American Idol*, *Survivor*, and *Deal or No Deal*. These shows gave viewers the opportunity to text in to cast votes or try to win prizes. More recently, text messaging took a big jump forward with the American response to the January 2010 earthquake in Haiti. Charities such as the Red Cross advertised a text messaging-based call for relief through all their marketing channels, including television. For example, viewers could text *Haiti* to a common short code, paying standard message and data rates, to donate \$10 to Haiti relief. In just a bit longer than seven days, the Red Cross and other charities raised over \$40 million via premium text messaging micro-donations (see Chapter 13); that is, donations for Haiti in \$5 or \$10 increments. (See Chapter 13 for more on making money with mobile.)

From these roots, text messaging has blossomed into a rich interactive medium. In the United States, billions of text messages are sent every day. In fact, text messaging has become the primary mobile communications medium. In March 2010, the Cellular Technology Industry Association ([www.ctia.org](http://www.ctia.org)) reported that U.S. mobile subscribers exchanged nearly 152.7 billion text messages a month. That's more than 5 billion a day! According to Nielsen, at the end of 2009, the average consumer sent 584 text messages versus using 180 voice minutes. Moreover, consumers are increasingly recognizing text messaging calls to action in traditional and new media marketing promotions. In 2010, consumers will exchange 5.5 trillion text messages worldwide.

## Creating user-flow diagrams

One of the most important aspects of planning is creating *user flows* — documents that outline as thoroughly as possible how your users engage in your campaign. User flows are critically important for two reasons:

- ✔ **They help you design and execute your program.** You save time and money by planning ahead in the program-development process instead of fixing mistakes later. Moreover, a detailed user flow clarifies any ambiguity about interactions between mobile subscribers and your program. Finally, it helps streamline communication among members of your marketing team and any partners and vendors you may be working with to launch the program.
- ✔ **They're required for certification of your program.** As part of the certification process (see Chapter 3 or the next section in this chapter), you're required to submit your program's user flows to your mobile marketing application provider or connection aggregator. Wireless carriers test your program against these user flows. If the program works as described in the user flows, the carrier certifies the program; if not, the carrier rejects it. Also, carriers use submitted user flows for future campaign audits to make sure that your program still meets the original certification criteria.

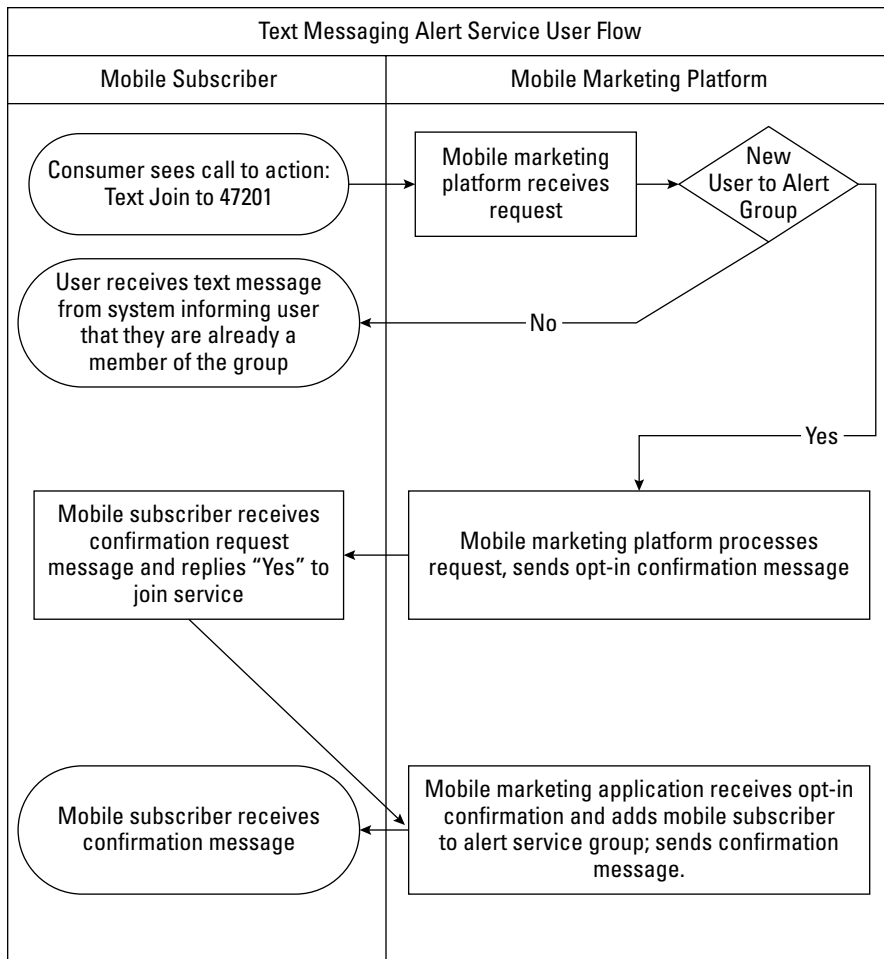
The best way to plan your text messaging flow is to use a user-flow diagram, as shown in Figure 4-2. A *user-flow diagram* is an image that outlines the user flow introduced in the preceding section and details all the interactions that may occur between a mobile subscriber and your mobile marketing program.

User-flow diagrams typically are created with word processing software applications such as Microsoft Word, Microsoft Excel, Microsoft PowerPoint, or Microsoft Visio. Some people use standard flow-charting techniques; others use images of phones to map the user flow. Figure 4-2 shows an example of a flow-chart method. Figure 4-3 shows the phone method. Which method you choose depends on which is more useful for documenting all the possible interactions that a mobile subscriber may have with your program.



Your application provider or connection aggregator typically has the most common user flows already designed — as well as the not-so-common ones. Rather than start with a blank piece of paper, ask the provider to give you a few examples. Then you can tailor an existing user flow.

To customize a user-flow diagram for your mobile marketing campaign, start with the user flow provided by your application provider and envision all possible scenarios and interactions between mobile subscribers and your mobile marketing program. Then write down what you envision, using the following two steps as a guide.



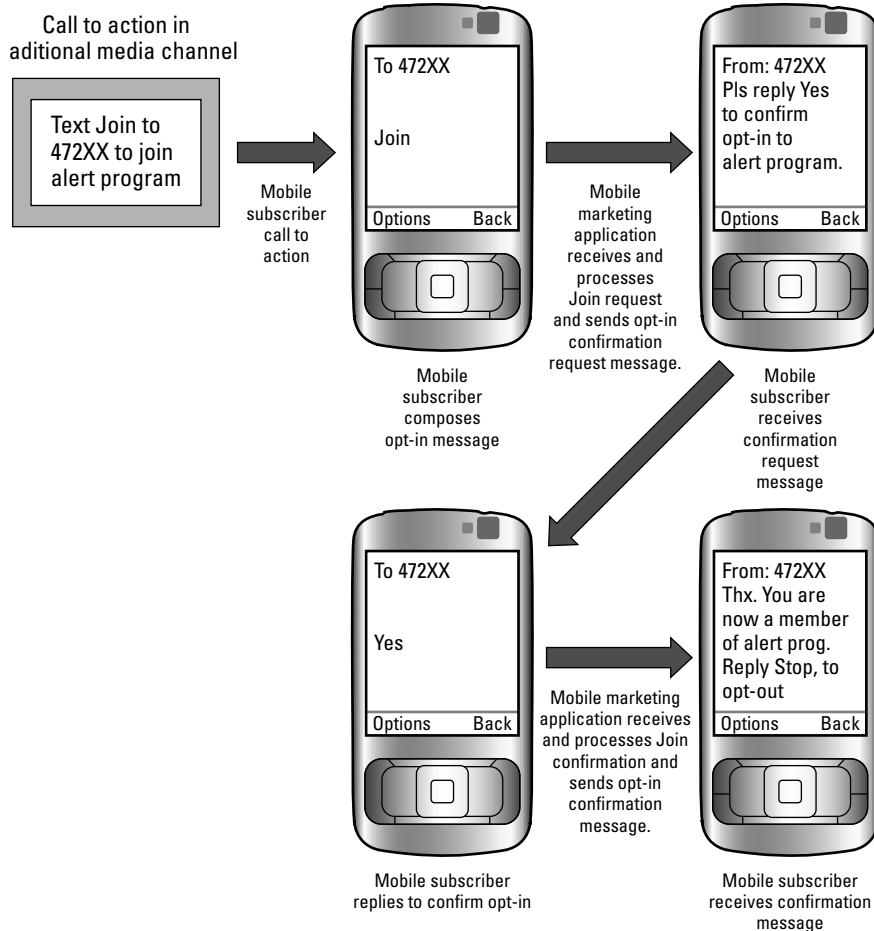
**Figure 4-2:**  
A sample  
user-flow  
diagram  
using the  
flow chart  
method.

### ***Step 1: Paint a positive picture***

Start by imagining what you want to have happen when everything works flawlessly. Picture what you want the perfect consumer experience to be. How do you want the opt-in flow to work, for example? What will the content-download experience look like?

### ***Step 2: Map your opt-in flow***

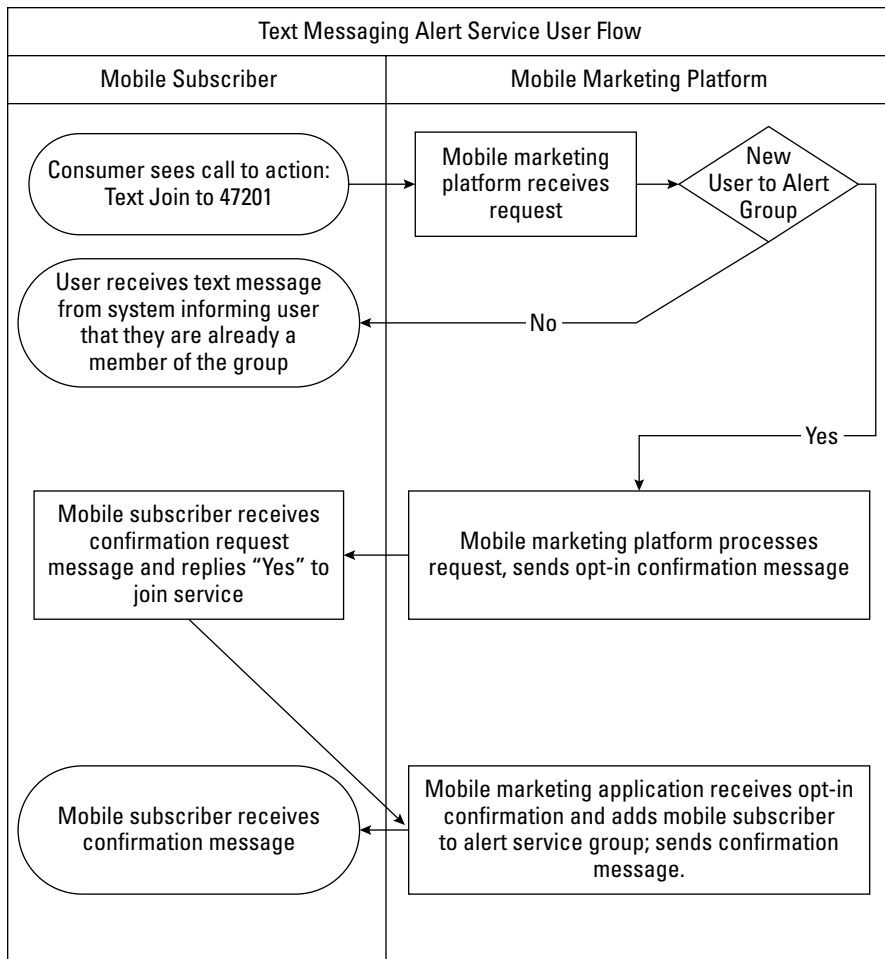
List the steps that a mobile subscriber must take to opt in to your program. Single opt-in is appropriate for programs that don't charge the consumer a premium for participation or programs.



**Figure 4-3:**  
A sample user-flow diagram using the phone method.

If you're going to have ongoing interactions with mobile subscribers, however, or plan to charge them a premium for participation, the industry's consumer best practices and regulations require you to get a double opt-in from all subscribers, meaning you have them send a second confirmation message and allow them to confirm their interest after their initial opt-in request, so you need to include that requirement in your user flow. (See Figure 4-4 for an example.) You can read more about managing opt-ins in Chapter 5. For more information about industry best practices and regulations, see Chapter 3.



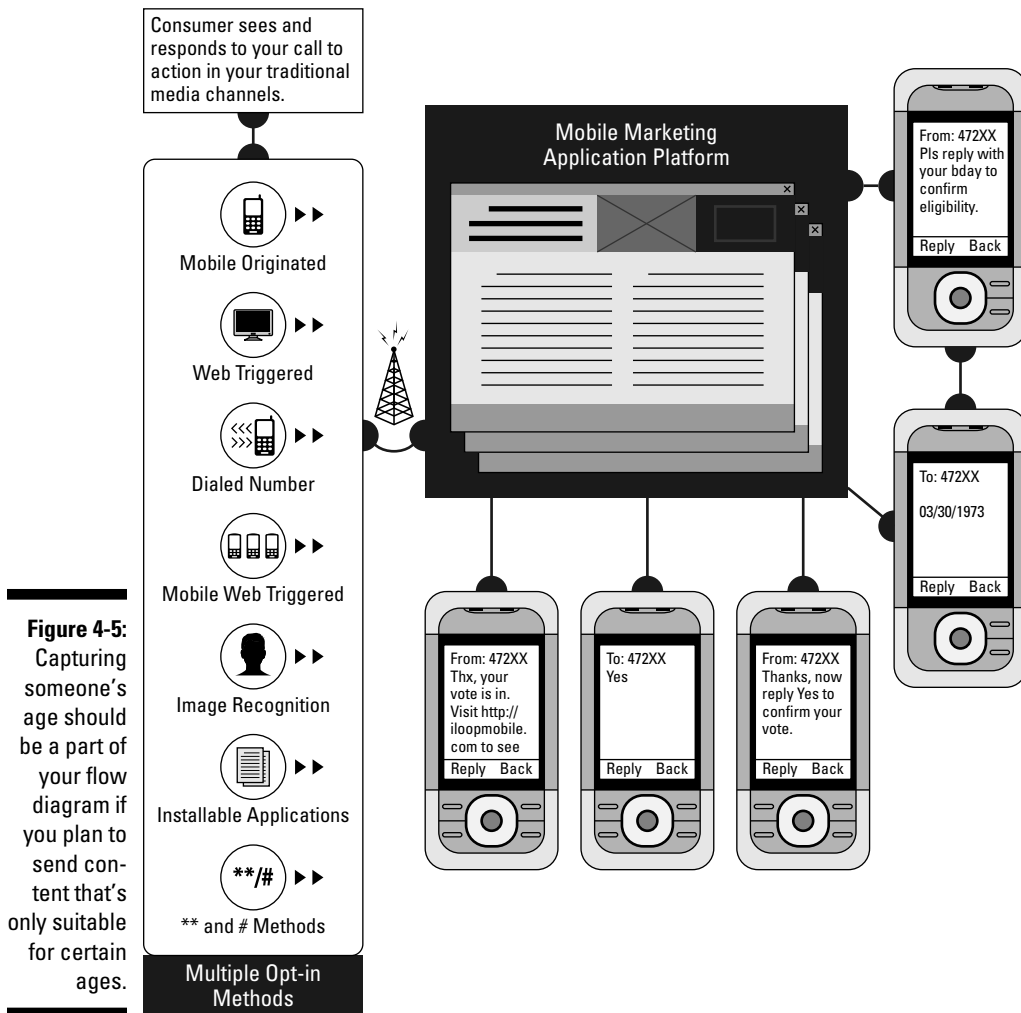


**Figure 4-4:** Make sure your flow diagram includes opt-in flow.

In addition to the standard flow of messaging, you also may want to consider several common optional user flows that don't apply to all mobile communication campaigns and include them in your diagram:

- ✓ **Age verification:** To augment the opt-in process, you may provide the mobile subscriber an age-verification challenge — that is, require him to reply with his birth date before he can move to the next step of the program. If you're promoting content that's not suitable for children, you may want to make sure that you have the mobile subscriber's proffered birth date in your campaign's customer database. Figure 4-5 shows a typical age-verification challenge that you can send to a mobile phone.

- ✔ **Instant win:** You may want to award loyalty points, free content, a coupon, or some other form of incentive to participants. You could configure your mobile marketing application to award an instant prize to every third participant in the program, for example, or set it so that one in three participants wins. Ask your application provider how to configure this user flow in your system.
- ✔ **Grand prize:** A grand-prize winner is selected from the pool of participants at the end of the campaign. The mobile marketing application can be set up to draw the specified number of grand-prize winners automatically at the end of the campaign, or you can make the drawing manually from the list of participants, based on whatever selection criteria you choose.





Make sure that your rules are in line with both state and federal regulations.

- ✓ **Couponing:** Couponing is a very powerful incentive for participation in mobile programs. You may consider adding coupons within any message in your user flow to encourage continued participation in your programs as well as to encourage users to purchase your offerings.

When you send out a message, a coupon — either generated by the mobile marketing application or supplied by you to the application — can be appended to or inserted into the message.

- ✓ **Personalization:** If your mobile marketing program is integrated with an internal or external customer relationship management (CRM) system, you may be able to pull data from this system to personalize the messages in the program. You could insert a participant's first name in a message, such as "Hi, Mike. Pls reply yes to confirm."



In addition to mapping out the best-case interaction scenarios for your program, you want to map out the worst-case scenarios and edge cases for your program. Try to think through all the things that could go wrong with your program, even the most outlandish possibilities (the *edge cases*), and then map them in your user-flow diagram.



Document how both you and your mobile marketing application will react if one or more of these scenarios comes to pass. What if some of your potential customers speak French instead of English, for example? Your mobile subscriber may respond to your program's opt-in call to action by sending *oui* instead of *yes* as instructed. To prepare for that possibility, you need to configure your mobile marketing application to accept *oui*, *si*, *yup*, *ok*, *yse*, *yes*, *y*, and so on, as synonyms for *yes*.

## Getting Approval for Your Text Messaging Campaigns

In the United States, all text messaging programs must be preapproved, or certified, by the mobile operator networks (this practice varies by country; check with your local application provider for assistance with certification requirements in different countries). The carriers require certification because they are ultimately liable for the traffic run over their networks and they want to ensure that their customers are receiving the highest quality service. Moreover, if one of their subscribers files a complaint or has a customer-care issue about a particular program, they want to make sure that they have on record the owner of the program and the appropriate customer support information to re-direct the customer to the campaign owner.

This section shows you what information you need to provide to the carriers in order to get approval, and how to walk through the approval and certification process.

## *First-time CSC and campaign certification*

If you're planning to run a text messaging campaign for the first time, you need carrier approval for your campaign's message flow and for your common short code (CSC) so that your CSC is activated on all the carrier platforms. If you have already run a campaign and you have a working CSC, you only need to get approval for any new message flows.

The process for CSC activation and carrier approval is straightforward, but it does take time — about 8 to 12 weeks from the submission of a completed campaign approval request form (Figure 4-6). The reality today is that most aggregators use an online tool rather than a form. You will more than likely never need to complete this form or have access to the online aggregator campaign certification tools — that is, unless you have your own applications and commercial agreements directly with an aggregator. Instead, your application provider will obtain the needed information from you and complete all the necessary forms and use the aggregator supplied tools on your behalf.

**Figure 4-6:**  
A sample  
campaign  
approval  
request  
form.



You can't submit an approval request form directly to the carriers; instead, you need to submit the necessary information to your application provider, who in turn completes the forms and submits the information to the aggregator, who then works with each individual carrier to get your program approved. Because so many people and steps are involved, you'll want to make sure that the information you provide is complete and accurate at the time of submission. If it's not, you'll have to fix any errors and you may need to start the approval process over.

You need to submit the following information to your application provider, who then uses it to complete the approval form that is submitted to the aggregator:

- ✓ **Sales contact:** This is your primary contact at the application provider.
- ✓ **Common short code (CSC) owner:** Specify who will own/owns the CSC — you or the application provider. (You can read more about CSCs in the next section.)
- ✓ **Type:** Specify whether you're using a random or vanity code. (Discover more about random and vanity codes in the section "Deciding what type of CSC to use" later in this chapter.)
- ✓ **Billing:** Specify whether the code will be used for standard rate or premium rate messaging.
- ✓ **Migration:** Specify whether you're moving the CSC from another application provider, or whether this is a new code.
- ✓ **Campaign duration:** How long will your campaign be running (for a few months, or forever)?
- ✓ **Type of campaign:** What type of campaign will you be running on the CSC; for example, alerts, couponing, polling/voting, sweepstakes, or other?
- ✓ **Which carriers the code will be run on:** Here's a word to the wise: Say all. It doesn't cost you any more money than picking just a couple, and you want to go through this process as few times as possible.
- ✓ **All the details of your campaign:** What is it intended for? What are its objectives and dates? How will you promote it? How much traffic do you intend for it to generate? What will the program user flows look like? and so on.
- ✓ **Up and running:** Prior to submitting your program for approval, all aspects of the program will need to be live and running (all user flows, all support, all marketing material, and so on) so that the carrier can run end-to-end testing of the program before approving it.

## *Re-certifying and getting updates*

Every single user flow and campaign on your CSC must go through the approval process. Whenever the current campaign user flows change or when you want to add additional consumer interactions (that is, new user flows) on the CSC, you have to go through the previously discussed certification process again. Although all the same information is still needed for new programs on an active short code, the approval process tends to be faster, above six to twelve weeks, compared to the eight to fifteen weeks. (These are U.S. estimates; every region varies.)

## *Auditing programs and maintaining compliance*

All text messaging traffic going through U.S. carrier networks is regularly audited by the carriers, meaning that it is compared to the information you supplied during your initial campaign certification. If the carriers find any discrepancies between your approved program and the actual live program you're running, they may choose to flag your program as being out of compliance. If they do, they will notify you of any infractions they find and give you a grace period to fix them. If you don't, the carriers may shut off your CSC temporarily or permanently, depending on the nature of the infraction.



Many campaign infractions are easy to fix and the carriers may show some leniency. For example, if your opt-in language needs adjustments, you just need to change a few words. Of course, fraud, improper disclosures, or any programs inappropriately delivering adult-, tobacco-, or alcohol-related content will get your CSC terminated. Read Chapter 3 for more information about regulations and rules governing text messaging campaigns to make sure you're in compliance.

## *Understanding Common Short Codes*

When it comes to commercially addressing text messages, your common short code means everything. In the United States, all commercial text messages (text messages for the purpose of mobile marketing) must be addressed and sent via common short codes.

A *common short code (CSC)* is simply a short (five or six digits) phone number used to address and route commercial text or multimedia

messages through wireless operator networks (see Figure 4-7). CSCs are critical because nearly all effective mobile marketing programs leverage text messaging in one way or another.

Common short codes are effective for mobile marketing because they're all of the following things:



- ✓ **Bidirectional messaging:** Messaging traffic can be addressed both ways with CSCs, both to and from the mobile subscriber and you.
- ✓ **Cross-carrier enabled:** After they're activated on a carrier network, CSCs work across most of the leading U.S. carriers, extending a marketer's reach to more than 235 million mobile subscribers in the United States.  
  
CSCs are country-specific, unlike Internet domains, which work worldwide. You need to lease a CSC in each country where you want to run your mobile marketing (see "Acquiring a common short code," later in this chapter).
- ✓ **Billing engines:** You can use premium Short Message Service (SMS) messages and charge people for participation in your programs. (For more information about premium SMS, also called PSMS, see Chapter 13.)
- ✓ **Effective mechanisms for permissions marketing:** CSCs are the primary means of obtaining opt-ins in mobile marketing.
- ✓ **Useful:** CSCs are useful for a wide range of marketing campaigns and services.



**Figure 4-7:**  
A common short code (CSC) is a shortened phone number.

The following sections show you how to acquire and use CSCs for your text messaging campaigns. We show you how to launch and run those campaigns in Chapter 5.



Although you may have heard of them, we highly encourage you not to consider using either long codes or SMTP messaging methods for your text messaging. *Long code* is the term used for a full 10+ digit phone number. It is technically possible to connect a mobile phone modem with its own mobile phone number to a device like a PC to send text messages to another phone number. Although this is technically possible, it is not commercially prudent. This solution can only support very low volumes (some hundreds of text messages), and moreover it circumvents all the commercial regulations, like the mobile Marketing Association's Consumer Best Practices Guidelines. *SMTP messaging* refers to addressing text messages with an e-mail format such as `usersphonenumber@carrieremailcomain.com` and sending those messages from a PC or similar platform. Like long codes, SMTP messaging is technically possible, but does not provide a sustainable quality service in terms of volume support or delivery reliability, nor does the practice adhere to industry best practices guidelines and regulations.

## Acquiring a common short code

You have two ways to gain access to a CSC for your mobile marketing program:

- ✓ **You can lease a CSC directly.** Choose this option when you want to run lots of different campaigns with no limit to the complexity of the campaigns.
- ✓ **You can rent access to an existing CSC.** Choose this option when you're on a budget or you need to run a minimum number of simple campaigns.

If you'd like to lease your own CSC directly, you can obtain it from one of the few short code administration bodies:

- ✓ **United States:** Common Short Code Administration ([www.usshortcodes.com](http://www.usshortcodes.com); see Figure 4-8).
- ✓ **Canada:** Canadian Wireless Telecommunications Association Common Codes Administration ([www.txt.ca/](http://www.txt.ca/))
- ✓ **Latin America:** Administracion de Codigos ([www.latinshortcodes.com](http://www.latinshortcodes.com))
- ✓ **United Kingdom:** U.K. Mobile Network Operators ([www.short-codes.com](http://www.short-codes.com))
- ✓ **France:** SMS+ ([www.smsplus.org/index.php](http://www.smsplus.org/index.php))
- ✓ **China:** Ministry of Information Industry Short Code Administration Group ([www.miit.gov.cn](http://www.miit.gov.cn))





To lease a short code or obtain access to one in other countries, you need to go through your application provider or a local aggregator. Ask your mobile marketing provider or local aggregator for assistance.

**Figure 4-8:**  
The U.S.  
Common  
Short Code  
Admin-  
istration  
provides  
CSC leasing  
in the U.S.



If you do decide to lease a short code, it's a pretty easy process. The following are the steps for doing so in the U.S. Remember that every registry may have a slightly different process:

1. **Go to the Common Short Code Administration Web site at [www.usshortcodes.com](http://www.usshortcodes.com).**
2. **Click on the Get an Account Now button, complete the form that appears (create a user ID, password, enter your address, and so on), and register your account.**

If you're the marketer (as opposed to the application provider), select the role of content provider from the drop-down list and click Create Account.

3. **After you've created the account, you are asked to log in. After you log in with your user ID and password, click on the Apply for a New CSC link (on the left) and fill out the form that appears. Click Submit.**



If you're having your application provider do this for you, be sure it puts your contact info in as the content provider. That way, if you leave your application provider, you will own the common short code, as opposed to the provider. In addition, you need to specify whether you

want to lease the code for 3, 6, or 12 months, as well as the type of code (random or vanity) that you'd like. (See the following section for an explanation of random and vanity codes.)

**4. Read the terms and conditions and click the I Agree check box.**

**5. After you've accepted the terms and conditions, you are invited to confirm your purchase.**

If you do not complete the payment for the common short code immediately, they hold it for 60 days. If you do not pay within 60 days, the code goes back into the pool of available codes.



Leasing your CSC is just the first step. After you've leased your CSC, you then need to have it activated on the mobile operator networks and bound to an aggregator who in turn binds it to a mobile marketing application. After this binding is complete and your CSC is registered in the carrier networks, all messaging traffic addressed to the CSC must be routed through a carrier network, who hands it to the registered aggregator, who in turn will route it to your specified application provider's text messaging platform. (The process for doing this is called the carrier approval process, which we detail in the section, "Getting Approval for Your Text Messaging Campaigns," earlier in this chapter.)

Leasing your own CSC can cost anywhere from \$500-\$1,000 per month, and it takes many months to get a new CSC approved. If you're not prepared to get your own short code — due to the expense or due to the time it takes to activate one — you can ask an application provider or connection aggregator to rent you access to one of their CSCs.



Many countries don't have a centralized short-code administration body, in which case you must rent access to a short code. Although this approach may get you up and running faster, at less expense, you want to take care with using this model. Depending on the relationship you forge with the application provider, the application provider may end up owning all your customers (all the opt-ins) on the code. Also, if the application provider does not pay the short-code lease or if a program on the code in a shared model runs afoul of the carrier requirement, the carriers may turn off the code and your programs along with all the other programs running on the code. If you're going to be doing any mobile marketing beyond one-off campaigns here and there, take it from us: Make the investment and get your own CSC.

## *Deciding what type of CSC to use*

When you lease or rent access for your CSC, you have some other choices to make — namely, choosing the type of CSC to use. Here are the options you have and some tips for making the right choice:

✓ **Choosing random or vanity codes:** You'll need to choose between two short-code schemas:

- **Random short code:** A short code is considered to be *random* when the code-administration body assigns a random number sequence to the company leasing the code.
- **Vanity short code:** A short code is considered to be vanity when the code-administration body allows the company leasing the code to pick the numbers. An example of a vanity short code would be 46445, purchased specifically to spell *googl*. A company may choose to lease a vanity code to facilitate easy recall (77777) or to build its brand (57238 = *kraft*).

✓ **Deciding on five or six digits:** In addition to choosing a random or vanity short-code schema, you need to pick how many digits you want to use in your code: five or six. In the United States, you can lease five-digit codes as either random or vanity short codes, but six-digit codes can be leased only as vanity codes.

You may see four-digit short codes, but these codes tend to be reserved for the sole use of wireless carriers. Codes greater than six digits are called *long codes* and they're primarily used for running cross-border international programs.



## Going dedicated or shared

You can choose to run multiple mobile initiatives on a single short code simultaneously or to run only one at any given time. When multiple mobile marketing campaigns are run on a single short code, the code is referred to as *shared*. When only one service is running on the code at any given time, the code is referred to as *dedicated*.



In short-code terms, *dedicated* and *shared* have nothing to do with who owns or leases the short code; they apply solely to how the short code is being used. Therefore, you can use your own dedicated code, rent a dedicated code, use your own short code in a shared model, or rent access to a shared code.

Both dedicated and shared short-code models have pros and cons, as you see in Table 4-1.

<b>Table 4-1                      Short-Code Models</b>		
<b><i>Model</i></b>	<b><i>Pros</i></b>	<b><i>Cons</i></b>
Shared	Multiple initiatives can be run under one short code for a lower cost per initiative.	<p>You need to include keywords in SMS messages to identify the initiative.</p> <p>User flow and instructions for initiatives are more complex.</p> <p>One noncertified “outlaw” initiative could shut down all other initiatives on a shared short code.</p>
Dedicated	<p>End-user task flow is easy.</p> <p>End users can text without having to include keywords to identify the initiative.</p> <p>You have more flexibility in initiative tactics.</p> <p>Reporting is easier.</p>	<p>The company is not amortizing short-code costs over multiple initiatives.</p> <p>All metric data can belong only to the initiative on the dedicated short code.</p>



The shared and dedicated models are not cast in stone. As part of a company’s CSC strategy, a short code can be used as dedicated for a certain period and then used as shared with multiple initiatives running on it. Consult your application or connection-aggregator partner for details.

## *Choosing an SMS Application Platform*

The heart of your text messaging endeavors is your text messaging application (also often referred to as a text messaging platform). There are three approaches to gaining access to a text messaging platform:

- ✔ **Agency:** You work with a marketing agency and they handle everything for you.
- ✔ **Do-it-yourself:** You pay for, develop, and maintain your own solution yourself (this is a fairly expensive and risky endeavor given the fact that the technology and industry standards are often changing).
- ✔ **Platform:** You license access to a mobile marketing platform and either use this platform yourself or contract with the platform provider to manage it on your behalf.

Regardless of the approach you take, you should understand how text messaging platforms work and what they can and cannot do for you. That way, whether you license a platform, build it yourself, or contract with an agency, you know what to ask for, what features to consider, and what to evaluate your partnerships on. This section explains what to look for in a text messaging application platform, no matter which approach you take.



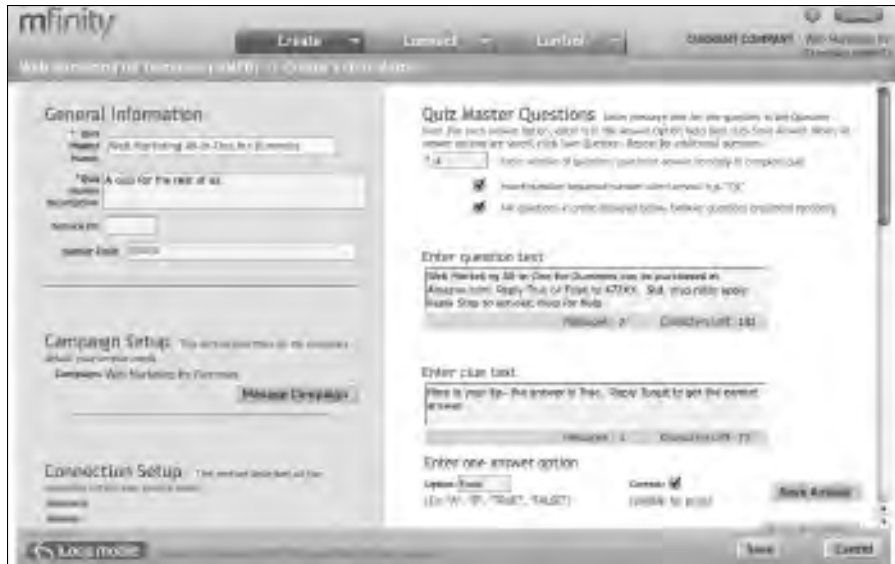
Building your own text messaging platform is beyond the scope of this book. If you're up for that challenge, get to know a venture capitalist and start your own mobile marketing business.

## *Understanding SMS application platform capabilities*

The text messaging application platform manages all the interactions between you and your customers. Regardless of what your specific text messaging campaign is about, your text messaging platform performs three primary functions:

- ✔ Manages the connection between the application and the mobile operator's networks. This is typically done through a message aggregator, but sometimes the application provider may have one or more direct connections to a mobile carrier.
- ✔ Provides an Internet-accessible administration interface so that you can manage all your text messaging campaigns, common short codes, keywords, or reporting. See Figure 4-9 as an example.
- ✔ Has a database that stores all the transactions you've had with your customers through text messaging (the data will include time of day, type of program, and customer response). It will also have application interfaces that can be used to export and or achieve (manually, periodically, or in real time) the customer transaction data to third-party databases, like your company customer relationship management systems.

**Figure 4-9:**  
Applications  
provide  
access to  
manage-  
ment tools  
such as  
templates.



In addition, providers of text messaging applications tend to provide the following consulting services as well:

- ✓ **Platform training:** To the extent that you want to learn, they can teach you how to use their platform.
- ✓ **Common short code registration services:** They'll help you rent or lease your codes, and get them activated and approved on carrier networks.
- ✓ **Campaign approval processes:** They'll help you get your campaigns approved by the carriers and assist you with navigating the myriad industry best practices and regulations, and help you respond to carrier audits.
- ✓ **Campaign consulting:** Although most leading technology providers do not make the best campaign consultants — use your agency for that instead — they can provide you with insights around what type of programs will be most effective to help you deliver value to your customer and to achieve your company objectives.

## Selecting your SMS provider

A tremendous amount of expertise goes into developing and maintaining a text messaging platform. When you're looking for a provider, be sure to ask about or consider the following:

- ✓ **Experience:** Does the provider have extensive mobile experience and relationships within the mobile marketing industry? Ask for references; review campaigns that they've run before. Don't take their word for it. Also, it seems like everyone has done something with one of the largest brands at some time in their past, like Coca-Cola or Procter & Gamble. Make sure their references are current.
- ✓ **Industry leadership:** Make sure the provider is a member of the Mobile Marketing Association, or at least is following the MMA best practices and standards of care. You should also check whether it is a member of the related trade associations that are pertinent to your business, like the Direct Marketing Association for direct marketers, the Internet Advertising Bureau for Internet advertisers, Shop.org for retailer, Online Publishers Association for publishers, and so on. Being members of one or more of these organizations demonstrates that the provider is continually learning and adapts to the changes in the industry.
- ✓ **Area of expertise:** Confirm which areas of mobile marketing the provider is an expert in. Some only provide SMS services and others offer a range of mobile marketing services including platform, analytics, strategy, creative, or execution. If the provider representative says that they are experts in all of these areas, make sure you drill down and find out who they work with or who they've recently bought. Be skeptical when one firm says they are an expert in everything.
- ✓ **Capabilities:** Does the provider have the capabilities you need to deliver or will they have to custom develop something special for you? If they have it on-hand, they can show you immediately.
- ✓ **The throughput/messaging capacity of the platform:** Ask how many text messages per second/per hour the platform can handle before it crashes and floats up to the top of the fish bowl. For example, if you're a successful national brand running a national television ad, you better make sure that your platform can handle millions of messages an hour. Even if you're a small company running a program, you still may run into capacity problems if the platform has a thousand other small companies each running a message. Don't be shy: Ask about throughput/capacity, ask to see reports, and have your provider prove that they can support your messaging traffic. Also, don't just ask about total volume, but peak spikes too. You want them to test for the maximum number of messages that may come in or go out at a specific period of time, not just the average.
- ✓ **Failover and disaster recovery plans:** Ask your provider representative if they're prepared for a catastrophe; for example, ask them what they'll do if their data center (where their servers are hosted) loses power or if a server or database fails? Ask them how quickly they can get back in service. If they are industry leaders, they'll have a redundant data center and can be back up in minutes with no loss of data. If they're not, your

programs may be running on a computer under someone's desk, and you could risk losing everything and being down for a very long time.

- ✓ **Pricing:** Pricing should be one of the last criteria you consider. Keep in mind that you get what you pay for. If you pay a little for your platform, don't expect a lot of service or support.

With the popularity of text messaging the mobile marketing increasing, both niche-market point solution providers and multi-capable platform providers are popping up all over the place. At the time of this writing, the leading text messaging providers include iLoop Mobile ([www.iloopmobile.com](http://www.iloopmobile.com)), Hipcricket ([www.hipcricket.com](http://www.hipcricket.com)), Waterfall Mobile ([www.waterfallmobile.com](http://www.waterfallmobile.com)), Vibes Media ([www.vibesmedia.com](http://www.vibesmedia.com)), Velti ([www.velt.com](http://www.velt.com)), 2Ergo ([www.2ergo.com](http://www.2ergo.com)), Telescope ([www.telescope.tv](http://www.telescope.tv)), BookIt ([www.bookit.net](http://www.bookit.net)), and SMaSh ([www.smashcode.com](http://www.smashcode.com)). There are also some very good smaller players, like mobileStorm ([www.mobilestorm.com](http://www.mobilestorm.com)), Cellit ([www.cellit.com](http://www.cellit.com)), and Mobile Card Cast ([www.mobilecardcast.com](http://www.mobilecardcast.com)).

If you want to do some additional research on SMS providers, we recommend that you start by contacting the Mobile Marketing Association ([www.mmaglobal.com](http://www.mmaglobal.com)) and getting a list of their members specializing in SMS. You should also check out the partners page at U.S. Short Codes.com ([www.usshortcodes.com/csc\\_applicators.html](http://www.usshortcodes.com/csc_applicators.html)) or simply conduct some Google searches.

## Setting Up Your SMS Database

SMS campaigns have the ability to collect all kinds of valuable data on the people who interact with your campaigns. For example, a simple SMS campaign can tell you

- ✓ Your customer's mobile phone number
- ✓ Your customer's carrier
- ✓ Your customer's phone model (if a Web URL is in the message and is clicked on by the consumer)
- ✓ Your customer's interests
- ✓ Any data you collect by asking your customers during a campaign



Be sure you confirm that your own database or your application provider's database can capture and store all that data so you can use it to target your marketing campaigns and follow up with customers. In addition to capturing and storing it, you also need to be able to manage your data.



This section shows you how to capture, store, and manage the data you collect from your SMS campaigns.



Read this section with care. Concern over personal information and privacy is at the forefront of many consumers' minds. Be careful with how you use information collected and be sure to stay current with local and federal laws regarding consumer privacy. Also, stay true to your mobile marketing code of conduct we discussed in Chapter 3.

## Creating consumer profiles

An important aspect of marketing is developing profiles of the members of your audience so that you can target different audiences. When setting up your database, make sure it is set up to collect enough information to build a profile of each type of person or group you want to target. You can develop these profiles by amassing several types of data from a wide range of sources, including

- ✓ **Demographic data:** Age, gender, race/ethnicity, religion, marital status, number of children, level of education, occupation, income, nationality, and location/place of residence.
- ✓ **Psychographic data:** Lifestyle/activity, attitudes, interests, purchasing motives, and products and services used frequently.
- ✓ **Preference data:** Consumer preferences for when and how many times they want to be communicated with, preferred modes of communication (SMS, print, e-mail, and so on).
- ✓ **Behavioral data:** Purchasing history, criteria for choosing products, effect of the environment (location, culture, family, media exposure, and so on) on their choices, Internet sites visited, ads and links clicked, customer-support interactions, and so on.
- ✓ **Situational data:** Situational data about the consumer; for example, where the consumer is, what the weather is, what the stocks are doing, and so on.
- ✓ **Syndicated data:** Consumer purchasing data compiled from individually scanned consumer transactions at thousands of locations.



In tech speak, all this data is commonly called *metadata* — data about something. If a database engineer asks, “What kind of metadata do you want to capture?”, you can answer, “I need demographic metadata: age, geography, psychographic data, and so on.” You can use that to impress people at cocktail parties, too!

Amassing all these data types helps you develop a clear picture of the needs, wants, and desires of your target audience; thus, you have a better chance of giving your customers excellent service and providing them value.

## *Collecting data automatically through SMS*

When a consumer opts in to your campaign via SMS, the mobile marketing application captures her mobile phone number. From this mobile phone number, your application provider captures the following data points, all of which you need to support the interaction with the subscriber and analyze your programs:

- ✓ **Previous participation in other programs you've run:** You can match the number to see whether it has been used in other campaigns.
- ✓ **Wireless carrier:** The number can identify the wireless carrier that the subscriber is using.
- ✓ **Crude location:** From the number's country and area codes, you can make a crude estimate of the subscriber's location: country, state, city, time zone, and so on.

You can't use this method for real-time location detection, however, because it doesn't tell you where the person is at any given time — just where his phone is registered.

- ✓ **Porting status:** You can find out whether the number has ever been moved from one wireless carrier to another.
- ✓ **Technical information:** You can find out whether the subscriber's phone supports binary data (such as pictures and video).



## *Collecting data manually through SMS*

You can ask campaign participants to submit any number of data points via SMS, including demographic, physiographic, and preference data. For example, you may ask a user to submit her birth date as an opt-in challenge. You simply need to make sure that your text messaging application allows you to collect the data appropriately. To collect data this way, your message flow has to allow for participants to text the information you want to collect to your short code in reply to a message. For example, your text message might say, "What's your first name? Reply with your first name."

## Accessing your mobile marketing data

For basic reporting purposes (such as number of votes, opt-ins, opt-outs, purchases, content downloads, or mobile Internet page views), you can access this information in the mobile marketing application's database via standard reporting tools in the application provider's software, as shown in Figure 4-10.



**Figure 4-10:**  
Application  
providers  
or other  
partners  
can give you  
access to  
your data.



For advanced reporting and data analysis, and to build your marketing database, most mobile application service providers allow you to export the information from your account in their systems.

After you've exported all the information from the mobile marketing application, you can combine it with other data you've collected on individual members of your audience or on your audience in general (see the following section). In other words, you can use your mobile marketing data to enhance the profile of your audience as a whole as well as profiles of individual members of your audience.

## *Integrating SMS data with your CRM*

Someday — maybe even today — you'll want to merge your mobile campaign data with the data stored in your company's customer relationship management (CRM) system. That way, you can follow up on the data you collect within the context of your normal sales or marketing operations. This process is easy enough and typically can be handled in any of three ways:

- ✔ **Manually:** You can ask your mobile marketing application provider to give you a report (in an Excel worksheet or an XML data structure, for example) so that you can combine your data with that of the CRM database manually.
- ✔ **Via data feed:** Your mobile marketing application provider should be able to give you access to an XML data feed. Then you can pull data from this feed on a regular basis (such as once a day or every five minutes) so that you can combine your data with that of the CRM database automatically on a set schedule.
- ✔ **In real time:** You can ask your mobile marketing application provider to send you real-time data as your participants interact with the system. (For example, maybe you need to know immediately if someone opts out of your campaign so that you can update permission marketing management systems in other parts of your company.)

## Chapter 5

# Executing Common Text Messaging Campaigns

---

### *In This Chapter*

- ▶ Managing opt-in and opt-out permission
  - ▶ Sending information and alerts
  - ▶ Creating text messaging coupons
  - ▶ Delivering interactive surveys, polls, and other campaigns
- 

**A**t first glance, text messaging seems to be a very simple service. I mean, really, what can be accomplished with 160 characters? If that's what you think, you will be surprised to discover just what text messaging can accomplish. You can

- ✓ Build awareness for your brand and products
- ✓ Stimulate engagement in your loyalty programs
- ✓ Sell goods and services and raise money
- ✓ Inform and entertain
- ✓ Recruit volunteers and build community
- ✓ Direct people to your store or events
- ✓ Provide real-time and asynchronous customer care and support
- ✓ Stimulate social media engagement
- ✓ Send last minute alerts and special VIP offers

These benefits are just the tip of the iceberg. You can do even more.

In this chapter, we focus on showing you how to set up text message-based mobile marketing programs, including promotion services, quizzes, polls, surveys, alert services, couponing, and more.

In the following pages, you discover how to manage consumer opt-ins for your text programs as well as how to gracefully handle the opt-outs when your customers tell you they don't want to hear from you via text anymore. You also find out about the common mobile marketing text programs, such as direct response, trivia, polls, surveys, mobile giving, alerts services, and more.

After reading this chapter, you'll have a clear, concise picture of exactly what it takes to run a text messaging program.

## *Getting Permission: The Opt-In*

So what's an opt-in or an opt-out? An *opt-in* is the step someone takes to give you permission to proactively send him text messages. An *opt-out* is the steps someone takes to let you know that he no longer wants to hear from you; that is, the steps he takes to revoke his opt-in permission.

Sometimes, mobile marketing interaction occurs only once, such as when a customer requests some information through a mobile interaction and you send the information in return. In the case of single interactions, you don't need to make your customers formally opt-in because there is no ongoing interaction between you and the customer. In this case, the consumer initiates the interaction, so he is, in effect, opting in to one communication by requesting the information in the first place. If you want to initiate a future interaction (that is, send the consumer messages on an ongoing basis), you must get the consumer's permission with a formal opt-in.



The process of obtaining opt-ins is crucial to your long-term success in mobile marketing, especially with text messaging. Industry self-regulation and government laws alike require that you receive opt-ins from everyone before sending them text messages that you initiate.

The following sections show you how to gain formal opt-in permission and how to provide opt-out for subscribers who no longer want to receive your information.

## *Placing an opt-in call to action in media*

A request for an opt-in is called an *opt-in call to action*. You can place an opt-in call to action in any traditional, new, and mobile media channel, including the following:

- ✓ Television
- ✓ Print (including magazines, coupons, package labels, and so on)
- ✓ Radio
- ✓ Point-of-sale displays (see Figure 5-1)
- ✓ Face-to-face encounters
- ✓ Outdoor advertising
- ✓ A Web page or advertisement
- ✓ An advertisement in a voice, text, or multimedia message, application, or mobile Internet site
- ✓ An e-mail
- ✓ A customer-care call

When you place a call to action in media, you're asking the members of your audience to pull out their phones, respond to your offer (opt-in to the campaign), and receive the benefits of your offer.

**Figure 5-1:**  
You can prompt customers to place an opt-in call using traditional media.



## Collecting mobile-originated opt-ins

A *mobile-originated opt-in* happens when someone uses her phone to send a text message in order to opt-in to receive future messages in return. The messages are called mobile-originated because they originate from the phone belonging to the person opting in.

When someone sends a mobile-originated (MO) message, your text-messaging application can respond with a mobile-terminated (MT) message that confirms the opt-in and gives additional information. Here's a summary of these two important message flows so you can better understand the information that follows in this section (read even more about message flow in Chapter 4):

- ✔ **Mobile-originated (MO):** A mobile subscriber composes (*originates*) a message on her phone and sends it to you.
- ✔ **Mobile-terminated (MT):** A message goes from an application provider's service to a mobile phone, so the message ends (*terminates*) on the phone.

When someone opts in to your mobile campaign with an MO message, you return an MT. Here are the three basic methods for collecting opt-ins using MO opt-in:

- ✔ **Single opt-in:** In a *single opt-in*, someone sends an MO in, and you simply send an MT back confirming the opt-in. Mostly, this process is used for one-time interactions; when the initial interaction is done, no future interactions will occur. However, if you want to continue to send messages in the future, you can use the single opt-in method only for standard rate messages where the opt-in is originated from the phone. (A *standard rate message* is a message billed to the consumer under the consumer's carrier messaging rate plan.) If the opt-in is originated from the Web or an app, or the like, you must get a double opt-in before you can send messages on an ongoing basis.
- ✔ **Double opt-in:** In the *double opt-in* scenario, someone sends an MO in, and you send an MT back requesting confirmation for the opt-in. For example, the system might respond with a text message that says, "Thanks, pls reply *Yes* to 12345. Std Msg&Data rates apply. To opt out, reply *stop*, or for help reply *help*."). If the user sends the confirmation, he is opted in to the program and the mobile marketing application processes the request and sends back a welcome message, such as "Thank you. You're now in the group. To opt out reply *stop*, or for help reply *help*." Double opt-in is best for standard rate and premium rate text messaging programs, and when the opt-in is initiated from a source other than a text message (such as a Web site or another application).
- ✔ **Multistep opt-in:** Use *multistep opt-in* when you want to challenge consumers with additional questions before they can participate in your program. For example, you may ask users for their ages if you're running a program suitable only for users 17 and older, or you may ask a series of questions to collect additional *metadata* (data about themselves). After a user responds to the additional challenges, the interaction may end, or you may follow up by triggering a double opt-in as well to get express consent for future marketing.



## *Collecting opt-in through the Internet and applications*

Another great way to invite someone into your text messaging-based mobile marketing program is to present her a form on an Internet page, mobile Internet page, or in an installed application, as shown in Figure 5-2. For example, a customer can opt-in to receive text alerts.



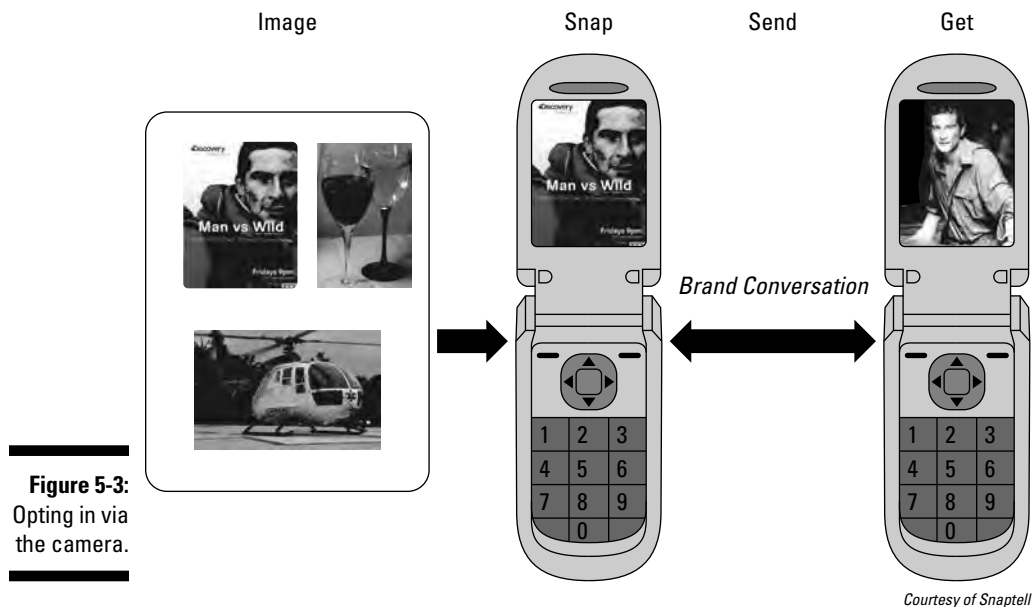
In addition to capturing a mobile phone number on your opt-in form, collect additional consumer information and preferences, such as areas of interest, address, birthday, and so on.

**Figure 5-2:**  
Have customers opt-in on the Web using a form to collect information.

## *Collecting opt-ins through snapping and scanning*

Cameras on mobile phones are wonderful tools for gathering opt-ins. You can instruct audience members to take a picture of an object, a soft-drink can, a magazine ad, a movie poster, or branded icon or almost anything else that

has clearly defined edges and then instruct them to e-mail or text (via MMS) the picture to your mobile marketing program; some applications can also recognize the image locally on the phone, thus skipping the step of sending the picture in. When your program receives the picture, or the application decodes it, it processes the picture and then opts the mobile subscriber in to the program (see Figure 5-3). This process is sometimes called *image recognition*, *visual search*, or *digital watermarking*.



TIP

The camera can be used for so much more, including the emerging practice of augmented reality (AR). *Augmented reality* refers to the effort to enhance a physical real-world image with computer generated imagery. For example, after downloading an application designed for augmented reality to their phones, your customers' camera viewfinders might depict the real world, as it always had — but with directions to your business or with three-dimensional images of your products superimposed over it. Stella Artois, the brewer, has an AR application that points the way to the closest bar to get a Stella Artois beer. Pizza Hut has one you can use to find the nearest Pizza Hut. I-PoP ([www.i-pop.net](http://www.i-pop.net)) recently launched an AR dressing room in which an Adidas shirt is superimposed on any person standing in front of an augmented-reality-enhanced display or mirror — and with the click of a button, the shirt can be changed.

There are a number of companies you can look at to help you with these services, including: Amazon's SnapTell ([www.snaptell.com](http://www.snaptell.com)), based in Palo Alto, California, Los Angeles-based SnapNow ([www.snapnow.com](http://www.snapnow.com)), The Hyperfactory ([www.hyperfactory.com](http://www.hyperfactory.com)), and Digimarc ([www.digimarc.com](http://www.digimarc.com)). Google has also launched Google Goggles (<http://www.google.com/mobile/goggles/>) for visual search. You should also check out Layar ([www.layar.com](http://www.layar.com)) and i-Pop ([www.i-pop.net](http://www.i-pop.net)). Do some online research and you'll find even more options in this expanding field.

## *Collecting opt-ins through dialing and pressing*

*Dialing and pressing* is all about consumers using their phones' keypads and the voice channel. You can encourage people to call a phone number by asking them to "dial 1-800-XXX-XXXX to experience the sounds of the movie" or "call 408-XXX-XXXX to listen in on the game," for example.



You don't have to answer the calls yourself; you can use an IVR (Interactive Voice Response) system to ask the caller to make selections. Selection options in an IVR session could include "Press 1 to receive a ringtone," "Press 2 to get your last five transactions," or "Press 3 to get the movie listings sent to your phone," or something similar. You can read more about IVR in Chapter 11.



Mobile marketing programs and any other programs that use text messaging (such as IVR, Internet, or mobile Internet) must use common short codes (CSCs) to address and route the message traffic. For details on CSCs, refer Chapter 4.

You can also collect opt-ins with key touches. Two companies — Zoove ([www.zoove.com](http://www.zoove.com)) and Singletouch ([www.singletouch.com](http://www.singletouch.com)) — have developed two alternative opt-in channels.

Zoove's method uses the star (\*) key on the mobile phone. A mobile subscriber on the Sprint network, for example, can press \*\*267 — that is, \*\*AOL — and the Send/Talk button on his phone (typically, the green button). In return, an AOL promotional mobile Internet site is sent to the phone. Singletouch's solution works the same way but uses the pound (#) key instead.

Both services are still limited in their deployment across wireless carriers, but you can see the possibilities of these methods of opt-in.

## Gracefully Saying Goodbye: The Opt-Out

Breaking up is hard to do, but sometimes people just want to leave. They want to opt out and stop interacting with you. Maybe they'll come back, and maybe they won't, but you need to handle their requests with grace. Accept each request, reply politely, and *never contact the person again*. Otherwise, you'll become a spammer, and you don't want that.



Every best-practices guideline on calls to action covers opt-outs. You must include opt-out instructions that explain your program in your media and in the legal terms and conditions.



Industry best practices and regulations require all text messages to contain opt-out instructions, such as a *stop* keyword. You can read more about the industry best practices and legalities of obtaining permissions in Chapter 3.

You can use any of the opt-in methods discussed earlier in this chapter to capture opt-outs, but the most convenient way to gather an opt-out is simply to have the mobile subscriber send the mobile marketing application a text message that includes the keyword *stop* (or any other reserved opt-out keyword, such as *end*, *quit*, or *cancel*). When you receive the opt-out request, send a final reply, such as, "Thank you. Your opt-out request has been processed. We'll miss you. If you'd like to join again, reply *join* to 12345." Figure 5-4 shows an example.

**Figure 5-4:**  
Replying  
*stop* to  
an MT  
message is  
the easiest  
way to  
opt out.



*Courtesy of iLoop Mobile*

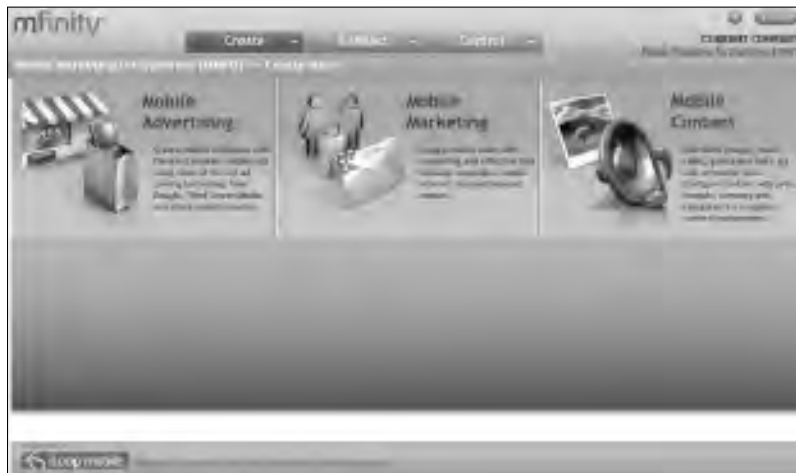
## *Sending Information and Alerts via SMS*

One of the simplest and most effective forms of text messaging is sending text messages on a periodic or regularly scheduled basis. You can send messages once a day, a couple times a week, or just once in a while, depending on the type of information and the frequency your subscriber expects.

You can also send alerts that are triggered as a response to an event, such as a birthday, recent purchase, or the availability of an overstocked item at a discount. The following sections help you understand when and how to send information and alerts via SMS.

### *Scheduling and sending SMS information*

You can send your text messaging content to your mobile marketing agency or application provider and ask it to send it out, or if you have licensed access to a mobile marketing application platform, you can do it yourself, as shown in Figure 5-5.



**Figure 5-5:**  
Sending  
SMS  
messages  
is easy  
using an  
application  
platform.

If you're going to do it yourself, you can follow these steps. These are generic steps, and are not specific to one application. Most application providers have a similar process:

1. Launch your Internet browser and log in to the application.
2. Select the alert service feature.
3. Select the Schedule a Message button.
4. Fill out the message scheduling form, including your 160 character message, the keyword, and common short code associated with the program.
5. Select the database lists you want to send the message to and apply any filters (see the section titled “Sending filtered and automated SMS alerts” later in this chapter for more information).
6. Select the Send Now button to send the message immediately, or the Schedule/Calendar button to schedule the date and time you want the message to be automatically delivered.
7. Select the Send/Save button.

The above is a generic user flow that is supported by most text messaging application provider solutions. If your messages change frequently, you may want to look for an application provider that lets you manage the content. This gives you more control over the timing of changes made, which is useful, but on the other hand it requires more work from you. Again, most applications offer similar user interfaces, and many providers can write one that is customized for your needs.



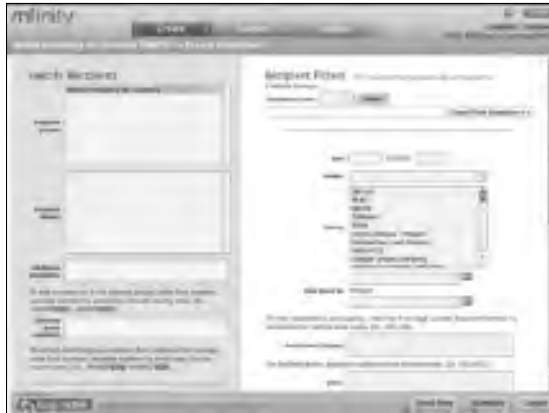
After you’ve sent your message, be sure to keep an eye on your reports (see Chapter 14 for more on reporting and analytics). Pay special attention to response rates. Did people reply to your call to action, like clicking on a link? Or did many people opt-out immediately upon receiving your message? If so, maybe your message was not targeted well enough and you need to work on the relevance of your content. Paying attention to these reports and adjusting to the results you see is the key to ongoing success with your text alert programs.

## ***Sending filtered and automated SMS alerts***

Most mobile marketing application providers give you the ability to filter your list of opted-in customers before you send a message. *Filtering* means you can select only those people in your list that meet a specific set of criteria. For example, say you’re a concert promoter and you have a database of 100,000 subscribers, but you only want to send a message to the 15,000 people in the database who like hard rock, are between the ages of 25–30,

and live in the San Francisco Bay area. All you need to do is log in to your provider's application, select the criteria you are interested in filtering the list for, and then press the filter button (see Figure 5-6).

**Figure 5-6:**  
Filtering  
allows you  
to send  
SMS  
messages  
to specific  
groups of  
subscribers.



*Courtesy of iLoop Mobile*



In order for filtering to work, your database must contain identifying information about your list. You can read more about building database profiles in Chapter 4.

If your database also contains information that pertains to event dates, you can use your application's filter to automatically send an SMS to a single subscriber or a group of subscribers when a certain date in any database field coincides with the date you specify in your filter. For example, you might want to send a birthday announcement to anyone whose birthday field contains the date July 4.

Filtering by date starts to get really interesting and powerful when you have a content management system or data service that sends information to your SMS application, which is in turn programmed to send an SMS to the customers in your database who are affected by that information. For example, if you subscribe to a weather service, stock quotes, or holidays, your SMS application could be programmed to send alerts to the customers who request alerts related to that information.

You can also use filtering to set parameters for your messages. For example, if you have some customers who only want to hear from you on the weekdays, or between 9 and 5, on their birthday, or only about specific topics in their immediate vicinity (a particular band, promotion, news or event

category, for example), you can set your filters to send or withhold a particular message based on those customized options.



If your text messaging application provider does not let you filter your database, or if it can't help you do it, find another provider. This is an incredibly important capability because it's the primary tool at your disposal to help you in sending relevant messages to your subscribers.

## *Following best practices for SMS timing and content*

When employing alerts services in your marketing programs, keep these things in mind:

- ✓ Always get permission first by obtaining an opt-in (see “Getting Permission: The Opt-In” section earlier in the chapter).
- ✓ Think about how often you send someone a message. Send too few and your relationship gets stale; send too many and you run the risk of annoying your customer. Make sure your content is relevant to the frequency you choose. For example, weather is a daily event, so a daily weather alert is appropriate.
- ✓ Keep the content fresh. No one wants to get the same discount or coupon code every single time he hears from you. Keep your content informative and entertaining with current events and news about your business, the industry, trivia, sweepstakes, and related promotional incentives and programs.
- ✓ Keep your content relevant to your audience by targeting and filtering your list as described in the previous section.
- ✓ Remember the character limits and formats. Text messages only support alphanumeric characters (such as A, B C...; 1, 2, 3...; !, @, #, and so on).
- ✓ Make sure you include the required industry language, like Std Msg&Data rates apply. (See the Mobile Marketing Association Consumer Best Practices guidelines at [www.mmaglobal.com/bestpractices.pdf](http://www.mmaglobal.com/bestpractices.pdf) for more details.)

## *Engaging with Mobile Coupons*

Text messaging is a great way to get offers, coupons, rebates, samples, vouchers, and gift cards into the hands of your customers. The concept is simple. The user sends a text message to request an offer or opts in to an alert service group to receive offers and similar content from you on a periodic basis.



There are two types of mobile coupon types you need to know about:

- ✓ **Closed systems:** *Closed system offers* refer to offers that are issued and redeemed by the same organization, for example, when your local pizza chain issues a coupon and redeems the coupon at one of its stores.
- ✓ **Open systems:** *Open system offers* refer to the situation when the issuer of the offer (such as your favorite soft drink brand) and the redeemer of the offer (such as a grocery store selling that soft drink) are different. For example, the soft drink brand issues a 2 for 1 coupon or offer and your grocer honors the coupon. You grocer takes your money, less the discount. The grocer must then work with an open system intermediary, like Inmar ([www.inmar.com](http://www.inmar.com)) or Valassis ([www.valassis.com](http://www.valassis.com)) to coordinate with the soft drink brand to receive reimbursement for having honored the coupon.

In the following sections, we explain how to set up the two types of mobile coupon systems and provide tips for getting the best results from your mobile coupon program.

## *Setting up your couponing program*

To set up a closed system coupon program, you have two choices:

- ✓ **You can manage the program yourself.** This is done by using a general text application provider's direct response or alert service applications. In order to send coupons, you need only send text messages that contain the offer you want your audience to redeem. The offer can be all text with instructions on how to redeem the coupons, and you can also include offer codes and other information that give the coupons specialized features.
- ✓ **You can work with a specialized mobile couponing firm.** Companies that enable mobile coupons include lots of specialized features such as offer codes, personalization, and database integrations. Some of the best mobile coupons companies are iLoop Mobile ([www.iloopmobile.com](http://www.iloopmobile.com)), Hipcricket ([www.hipcricket.com](http://www.hipcricket.com)), Money Mailer ([www.moneymailer.com](http://www.moneymailer.com)), Where ([www.where.com](http://www.where.com)), eKwipper ([www.eKwipper.com](http://www.eKwipper.com)), and 8coupons ([www.8coupons.com](http://www.8coupons.com)).

Setting up an open system coupon program is a bit more complicated because you need to work with solution providers that can tie all the pieces together. You'll need to work with your solution provider to make sure all of the following participants in your program can work together:

- ✓ **The issuer of the coupon:** If that's you, your coupon needs to have all the features that the rest of your participants need to use. For example, if your coupon is redeemable at a point of sale, the point-of-sale computer has to be able to use the information you put in the coupon.
- ✓ **The redeemer of the coupon:** Your customer has to be able to receive, view, and interact with the coupon. This requires making sure the coupon works on the customer's phone and incorporates the capabilities of the phone such as touchscreen or Internet browser.
- ✓ **The point-of-sales solution:** The coupon has to be redeemed by someone and usually entered into a database to track the coupon and record the sale at the same time. Some coupons are redeemable online and others at a register in a store, so your coupon needs to be able to accommodate whatever form of entry is required. (We discuss redemption methods in the next section.)

## *Setting up coupon redemption at a point of sale*

When someone receives a text coupon from you, you're going to have to tell him how to redeem the coupon. Several methods are available for point-of-sale redemption, including

- ✓ **Asking the customer to show her coupon to a clerk in the store.** With this method, the store clerk simply reduces the price of the purchase and maybe records the coupon in the system or on a less formal record-keeping tool, like a clipboard with a place to write down the details of the transaction.
- ✓ **Giving the customer an offer ID to share with the person in the store (see Figure 5-7).** Use your coupon system to generate a randomly assigned code that is unique to each customer, and then record each redemption code to prevent people from redeeming a coupon more than once.
- ✓ **Sending a special mobile bar code that can be scanned at the counter.** This is the most automated method, but it's also the method with the most technical challenges (we discuss these challenges in the remainder of this section).

**Figure 5-7:**  
Offer IDs in  
a coupon  
can be  
assigned to  
each  
customer.



Any of the aforementioned methods of point-of-sale redemption require some type of system for recording the details of the coupon. Methods for recording the coupon can get pretty sophisticated, and you *should* get sophisticated if you want to track interactions with your customers. Any information about coupon redemption can tell you a lot about what your customers are buying and how they are buying.

The most sophisticated way to redeem and record mobile coupons is by delivering a bar code to a user's phone (Figure 5-8). Mobile bar codes are a bit different from the bar codes you typically see on packaging or paper coupons, and scanning them requires a special POS scanner. (Traditional in-store scanners can't read a mobile phone's screen reliably, and phone screens are very small, so bar code data footprints are limited.) Mobile bar codes are often referred to as 2D or 3D codes. As of this writing, Target and Starbucks are the only two companies that formally accept these codes.

One challenge with this method is that the 2D and 3D scanners can be quite expensive. Although they're common in some countries, such as Japan, they're not yet widely deployed in the United States. Another challenge is that mobile phones and networks must be configured to support 2D and 3D bar codes.



**Figure 5-8:**  
2D and 3D  
mobile bar  
codes can  
be scanned  
at a point of  
purchase.



One mobile couponing company, bCODE ([www.bcode.com](http://www.bcode.com)), combines text and scanning. You should also check out Scanbuy ([www.scanbuy.com](http://www.scanbuy.com)), NeoMedia ([www.neom.com](http://www.neom.com)), and Neustar ([www.neustar.com](http://www.neustar.com)) for more on the latest in 2D barcodes. These companies send the coupon via text, MMS, Web sites, and applications, and they can provide you with a scanner that you can put in your store to scan phones and redeem coupons.



Keep in mind, however, that just having the scanner isn't enough to enable your mobile coupon codes to work effectively. Your coupons and scanners also need to be incorporated into other POS systems features such as computing taxes, generating a receipt, and communicating with various other software modules or applications for things like inventory management, loyalty applications, and forecasting. Your mobile coupon scanning system also needs to integrate with your POS system's traditional bar code readers, credit card readers, and other external devices for recording items purchased, identifying customers, and collecting electronic payments.

The mobile marketing industry has made great strides in delivering mobile POS technology and gaining consumer acceptance of mobile coupons. The companies that are leading the way include mDot Network ([www.mdotnetwork.com](http://www.mdotnetwork.com)), Hipcricket ([www.hipcricket.com](http://www.hipcricket.com)), iLoop Mobile ([www.iloopmobile.com](http://www.iloopmobile.com)), and Infinian ([www.infinian.com](http://www.infinian.com)).

## Bar codes: More than just for coupons

Coupons are just one of the many uses of bar codes on and with the mobile phone. In addition for point-of-sale redemption of coupons, vouchers, gift cards, and so on, they can be used in mobile-enhanced traditional media to stimulate consumer opt-in and participate in mobile programs. The reason why they're so useful is you can cram a lot of data into one small bar code. Some of the more popular uses include airline check-in, business cards to share contact information, calendar/event promotion, URL/e-mail address promotion, Geo-location map links, text or pictures, and more. One major challenge with bar codes is that the industry has not yet adopted a common standard. There are 1D, 2D, and 3D bar codes and countless implementations of each. Just a few of the standards include QR-Codes, DataMatrix Codes, Cool-Data-Matrix, Semacodes, UPCODE, Trillcode,

Quickmark, Shotcode, Connexio, Beetagg, Qode, JagTag, and others. Some of the leading companies enabling bar codes for mobile include ScanBuy ([www.scanbuy.com](http://www.scanbuy.com)), NeoMedia ([www.neom.com](http://www.neom.com)), JagTag ([www.jagtag.com](http://www.jagtag.com)), Microsoft (<http://tag.microsoft.com>) and others. In the United States, Neustar ([www.neustar.com](http://www.neustar.com)) is actively helping to drive a common standard for bar codes. You can also find out more about 1D and 2D codes and Google's project zxing at <http://code.google.com/p/zxing>. On the flip side, a number of companies enable consumers to scan the bar codes on products for price comparison shopping and for gathering information, including Redlaser ([www.redlaser.com](http://www.redlaser.com)) and Big In Japan's ShopSavvy services ([www.biggu.com](http://www.biggu.com)).

These companies are working with numerous POS vendors to create an Internet-enabled network that allows mobile marketers to execute seamlessly and securely at the POS without requiring the retailers to replace POS hardware and software. Companies like Microsoft are working on the next generation of POS systems which will run on the Internet as opposed to being installed on proprietary hardware in the store. These companies will provide connectors (called APIs or Application Programming Interfaces) so that mobile marketers can integrate directly with the POS software.

In the next few years, you will see mobile marketing at POS take off as the technologies for connecting mobile devices to the POS systems in real time become mature and widely accepted. Just like with ATM machines in the 1970s and 1980s, adoption and maturity of these technologies will take time, but eventually will become second nature to us.

## Getting technical with text coupons

Mobile coupons can get pretty technical behind the scenes. Suppose you want your coupon to only be redeemed once, or you want to give everyone on your customer list a unique offer code so only that person can redeem the coupon. Complex databases are sometimes required to generate all kinds of parameters and functions that generate the messages, the associated offer codes, and the relationship

between the offer and the interaction with a real person. Mobile coupon application providers take your coupon requirements — and those of your program participants — and put them into a database so that the system that generates the coupons knows how to formulate the features of the coupon when it is sent out. Talk to your mobile application provider about its solution and how configurable it is.

## *Setting up Internet and application coupon redemption*

In addition to point-of-sale redemption, mobile coupons can also be redeemed on a mobile Internet site or through a mobile application. Companies such as Cellfire ([www.cellfire.com](http://www.cellfire.com)) can enable coupons through the download of their applications. The application maintains all the coupons locally on the phone and continuously reaches out to the coupon server via an Internet connection on the phone to update itself automatically. Companies like mDot Network enable coupon redemption at the point of sale. (See Figure 5-9.)

Redeeming coupons through a mobile Internet site requires the customer to enter a code contained in the coupon or click a link with the code embedded. This method of coupon delivery can be very effective, but it isn't as universally applicable as text messaging for delivering coupons, for several reasons:

- ✓ The mobile subscriber has to have a phone that supports applications.
- ✓ The subscriber has to want to install the application.
- ✓ The subscriber has to know how to use the application.
- ✓ The subscriber has to be on a data services (Internet) plan with the mobile operator.

These limitations are disappearing fast, however, as mobile subscribers continue to adopt more advanced phones and services.

**Figure 5-9:**  
MDot, a  
leading  
mobile  
couponing  
provider for  
retail.



Courtesy of mDot Network

## *Offering incentives: Gifts, freebies, and samples*

It should come as no surprise to you that people respond to incentives. Offer them something of value, and they'll be more inclined to participate in your program and initiate communication with you. Continue offering them value, and they may become customers. Keep offering them value, and they'll become loyal customers. Keep offering them value after that, and you'll turn them into evangelists who'll start doing your marketing for you. This process starts with the first engagement, and an incentive is a great way to kick-start the interaction.

The most common forms of incentives are

- ✓ **Money:** Coupons, discounts on services, or even hard cash
- ✓ **Content:** Free ringtones, wallpapers, images, and so on
- ✓ **Free stuff and experiences:** Tickets for trial and sample products, free movie admission, a chance to go backstage and meet the star, and so on



In the United States, wireless carriers tend to frown on your offering free content such as ringtones and wallpapers, especially if they're selling the same content via their branded content storefronts on the phone. Free content programs must be preapproved and certified with the wireless carriers, and your best shot at getting approval is offering content that isn't available anywhere else.



Not surprisingly, offering free content (like a ringtone, wallpaper, game, application and so on) is also often your best shot at getting mobile subscriber participation; many subscribers value unique or personalized content.

## *Managing prize promos, contests, and giveaways*

It's common practice in marketing to offer prize promotions, run contests, and give stuff away as incentives to encourage people to participate in marketing programs. You could run a program that gives out small prizes instantly throughout the campaign period and ends by awarding one lucky participant a grand prize, such as a new car or a vacation. This format works well in traditional marketing programs, and it works well in mobile marketing programs too.

You can enhance any of your mobile marketing promotions — text-based communication programs, voice programs, mobile Internet programs, and so on — with incentives. The process is simple:

- 1. Promote the incentive along with the call to action to participate.**
- 2. Set the odds of winning (often a configurable element) in the mobile marketing application.**

If you're going to have an instant-win component or a grand prize, configure the odds for that too.

- 3. Coordinate with your prize fulfillment house if you're going to be giving away physical goods or services, or configure your mobile marketing application to award content to be consumed on a mobile phone (such as a ringtone).**



When you run any type of contest, sweepstakes, or giveaway program, you absolutely must work with your legal team to document the rules and the related terms and conditions of your program. The law requires you to provide this documentation, such as start and end date of the program, alternative forms of entry, value of prize, who is eligible, and so on. Every state has its own laws about these types of programs, so if you're running a campaign, make sure that you're compliant with all the individual state laws. You can read more about legalities of mobile campaigns in Chapter 3. Also, you can contact ePrize ([www.eprize.com](http://www.eprize.com)), one of the leading sweepstakes providers in the United States.



## Giving people a taste: Product-sampling programs

Sampling is another fantastic tool you should consider using in your marketing communications programs. For many products, all it takes to get a consumer hooked is that first use. Mobile marketing is a good vehicle for sampling. For digital content, you can deliver a clipped version of the song, a photo with *Preview* stamped on it, and so on. You can't get physical goods (such as a new sports drink) into a phone, however, so your best bet is to mail product samples to program participants or mail them a card that they can use to get the samples free at a local store.

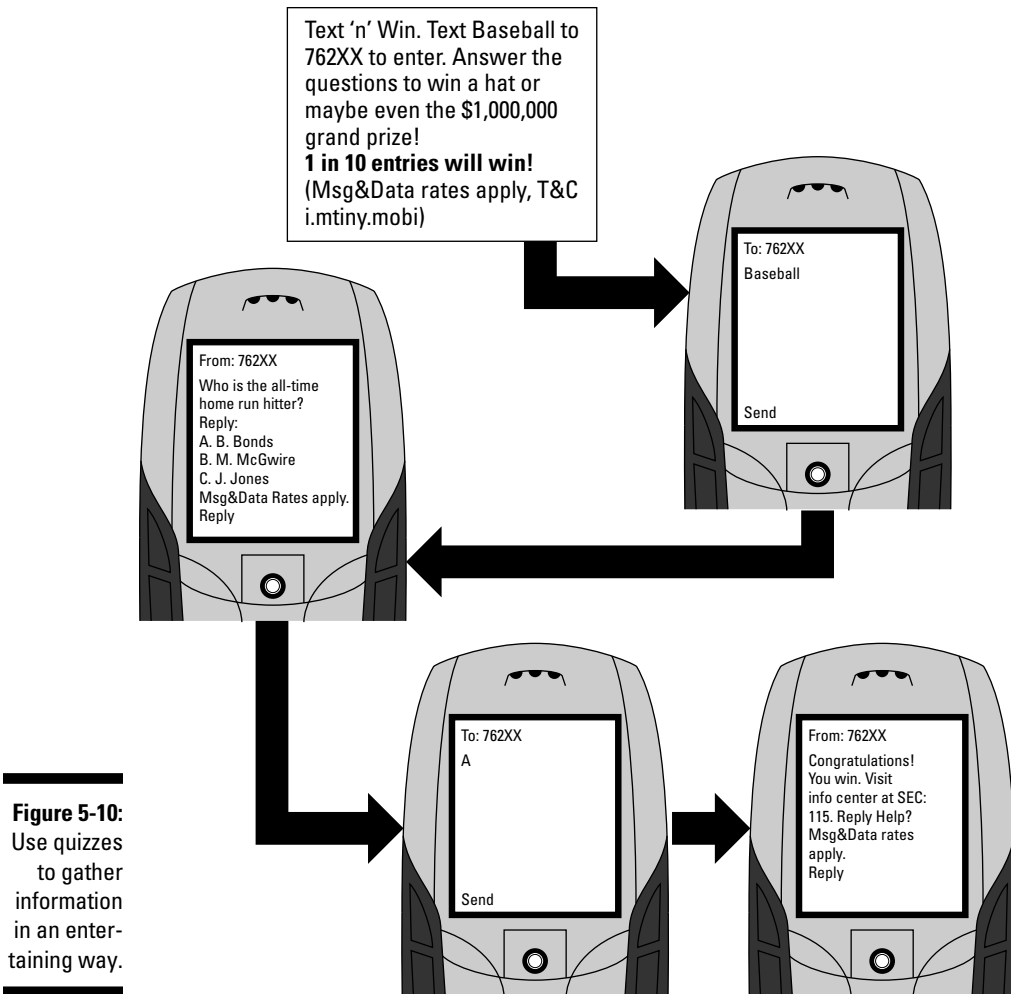
To run a sampling program, promote it in traditional media. When a mobile subscriber responds, you can query him for his address via interactive voice response (IVR, see Chapter 11 for more) or text messaging. When you have all the information, you can thank the user and send him a text message saying that he'll get his sample in a few days, barring any delays in shipping.

The mobile marketing company ShopText ([www.shoptext.com](http://www.shoptext.com)) has refined this process to an art. With ShopText, you can set up not only sampling programs, but also commerce programs.

## Offering Quizzes and Trivia

Mobile subscribers interact with quizzes and trivia programs by responding to questions sent to their phones. You can use text messaging in quiz programs to gather feedback, consumer opinions, or votes, as well as to inform and entertain. Your customers can have a great time with trivia programs, for example.

A *closed-ended* quiz is a program that gives mobile subscribers a fixed set of response options, such as *a*, *b*, *c*, and *d* or *true* and *false*. (See Figure 5-10 for a sample quiz.) If a user gets the answer right, you can send a response message saying "You're correct" or "You win." But if the user sends an answer that doesn't match any of the predefined answers, you should send back an error-response message with instructions for answering the question correctly. If the user tries to answer a question twice, you could send a reply like "I'm sorry, you've already answered that question," or "We did not understand your answer."



**Figure 5-10:** Use quizzes to gather information in an entertaining way.

## Setting up quiz options

In addition to the typical user flow (see Chapter 4 for more on user flows), your mobile marketing application provider should be able to provide the following configurable options for a quiz program:

- ✓ **Question-response format:** Decide which format you want to use for user responses, such as alphanumeric selection (*a*, *b*, *c*, and *d* or *1*, *2*, *3*, and *4*), binary choice (*true* and *false* or *yes* and *no*), or individual items (*red*, *green*, *blue*, and so on).

- ✔ **Question order:** Decide whether questions should be delivered in fixed linear order or pulled randomly from a pool of questions. You may want your audience to answer the same five questions in a specific order, or you may have the service pull five questions randomly from a pool of 500, generating a random set of questions for each participant.
- ✔ **Question count:** Decide how many questions a user must answer to complete the program. If the quiz is configured so that the user has to answer five questions, for example, the mobile marketing application will send the next question in the sequence or pull one randomly (see the preceding item) until all the questions in the campaign sequence are sent or the user opts out of the service.
- ✔ **Auto-response format:** Decide whether each question has a correct answer or is simply being used to collect user input (see the next section, “Setting quiz response options”). In either case, you also need to decide when to send an individual text message to the mobile subscriber: after each answer (correct or incorrect) or upon completion of the quiz, for example.



Along the way, include opt-in and opt-out options and a reminder about how standard messages and data rates may apply if you plan to ask a lot of questions. Refresh your memory of this in Chapters 3 and 4.

## Setting up quiz response options



You may run a quiz that doesn't have correct or incorrect answers; you just want a response. In this case, you don't have to specify the response options as being correct or incorrect. All responses are simply accepted and recorded. Following are a few examples of response options you can set (see Figure 5-11):

- ✔ **Clue:** If your program supports a clue element, users can request a clue to answer a question. Suppose that a user is stuck on the third question. If he texts *clue* or *hint* to the mobile marketing application, the application sends back a clue for the question.
- ✔ **Action on incorrect response:** Decide what happens when users give incorrect responses. If a user gets the third question wrong, for example, does she simply start over or move on to the next question until the campaign question count is reached? (For more information about question count, refer to “Setting up quiz options,” earlier in this chapter.)
- ✔ **Response timing:** You can choose to run a speed quiz that measures the speed of user responses. The fastest responder may win, for example.
- ✔ **Participation cap:** You may want to set a participation cap to limit how many times users can participate in the program during a given period — one to ten times a day, once a week, once a month, one time only, or unlimited times through the entire program, for example.

- ✓ **Repeat questions:** Decide whether to configure the service so that users receive some questions more than once or whether they always get different questions.
- ✓ **Premium billing:** Decide whether to bill mobile subscribers for participation in the program. (For details on making money with your mobile marketing programs, see Chapter 13.)

The screenshot displays the 'mfinity' mobile marketing application interface. The top navigation bar includes 'Create', 'Control', and 'Control' buttons. The main content area is divided into several sections:

- General Information:** Fields for Name, Number, Email, and Password.
- Campaign Setup:** Fields for Campaign Name, Start Date, and End Date.
- Connection Setup:** Fields for Account ID, API Key, and API Secret.
- Quiz Master Questions:** A section for defining quiz questions, including a 'Quiz Master Question' field and a 'Quiz Master Answer' field.
- Response Messages:** Fields for defining messages sent to users based on their quiz responses.
- Prize Configuration:** Fields for defining prizes and their associated costs.
- Participation Cap:** A field for setting a maximum number of participants.

The interface is designed for configuring a mobile marketing campaign, specifically a quiz-based campaign.

**Figure 5-11:**  
Some  
example  
quiz-  
response  
settings.



You can also use the application for quizzes to direct mobile subscribers to a particular next step in an application user flow, such as a product offering (a content storefront, for example) or another text messaging campaign or service. You can use the response to a question to initiate a mobile subscriber into a horoscope program, for example. When the subscriber answers the question, his response is used to configure the next question to be sent to his phone.

## Ratings by the pint: An interactive Guinness program

The Great Guinness Pint contest is an example of an interactive program. The program, which ran in 2008, allowed consumers to rate their pints of Guinness directly via mobile phone. Each time a consumer rated a pint, she was entered for a chance to win a trip to the Guinness brewery in Dublin, Ireland, for the company's 250th anniversary celebration. Participating accounts received recognition for the quality of pints they served. Each account owner, along with the Guinness team, tracked ratings in real time directly on a mobile phone as well as online. In addition to tracking progress, the Guinness team added or edited an account on the fly. When a new account was added, a keyword was generated automatically, allowing consumers to participate immediately.

Here's how the program worked: Throughout a participating account's bar, various point-of-sale (POS) materials, such as coasters, table tents, posters, and custom pint-rating

cards, were displayed. These POS materials encouraged customers to help Guinness find the greatest pint in America. Consumers were directed to text the word *great* (or a unique keyword assigned to each account) to 88500; when they did, they were prompted to rate the pint of Guinness that they were just served. Each POS material educated consumers on what makes a pint great, above and beyond taste.

In developing this program, John Lim, chief executive officer of Mobile Card Cast, knew that its success would be driven by the competitive nature of Guinness accounts and by high participation levels among consumers. Therefore, he used simple Short Message Service (SMS) technology to create ease of use for consumers and to allow account owners to access rankings through a simple mobile landing page. The following figure shows an example of the marketing materials used to promote the program within an establishment.

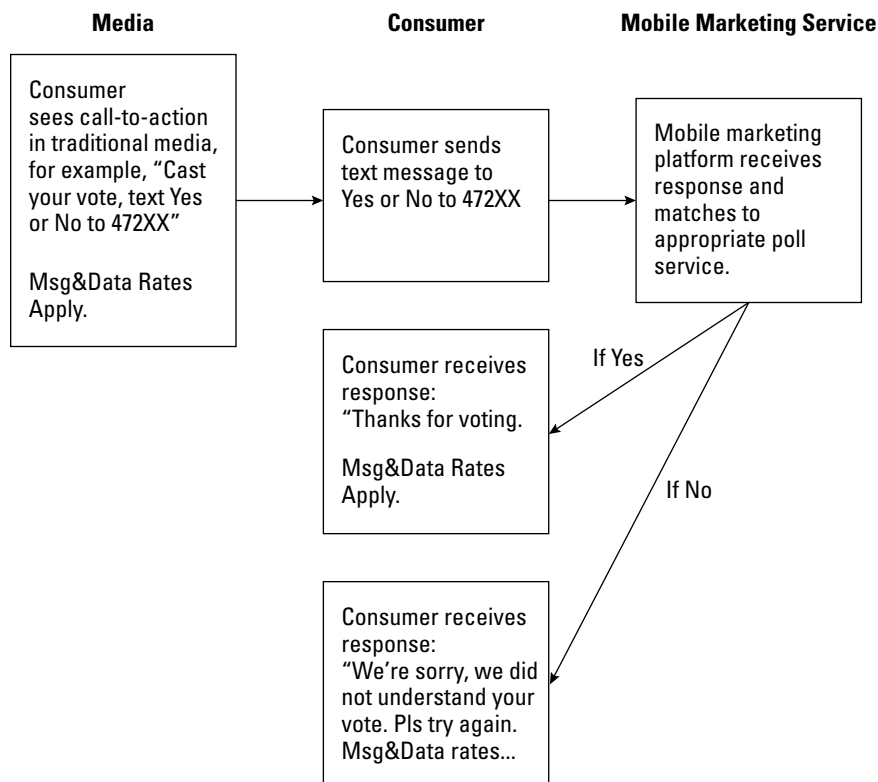


*Courtesy of Mobile Card Cast*

## Capturing Sentiment with Polling and Surveys

In *polls* (also referred to as *votes*), as opposed to quizzes and surveys, the questions you want your audience members to answer are placed in traditional or new media: billboards, in-store end caps, newspapers, television, e-mail and radio programs, and so on. Like quizzes and surveys, however, polling allows you to gather audience members' opinions and feedback as well as to inform and entertain.

In mobile marketing, a poll poses questions not in a text message but in traditional media. Mobile subscribers see or hear the call to action (such as "Text *a* or *b* to cast your vote"), and when they respond, the mobile marketing application sends a reply (such as "Thanks. You voted *a*. Total tally: *a* 35%, *b* 6%, *c* 59%"). See Figure 5-12 for a sample poll user flow.



**Figure 5-12:**  
A standard  
poll user  
flow.

## *Planning the survey*

In planning a survey program, you need to consider the following points:

- ✓ **How many questions to ask:** Don't go overboard. If you ask too many questions, people will simply drop out without completing their participation in your program.
- ✓ **The order in which questions will be asked:** Think about the order in which you ask the questions. Does some flow make particular sense?
- ✓ **The required length of answers:** Remember that most people don't have mobile phones with full keyboards, and pecking out long messages can be tedious for them. Try to limit the information you need to short responses.

## *Using open-ended questions*

You can use open-ended text messaging survey programs to gather information such as consumer, candidate, or employee feedback. After a job interview, for example, you could send the candidate a text message like this: "Please give us your feedback on the interview process. Reply to this message with your feedback."

Unlike questions in quizzes (refer to the section, "Offering Quizzes and Trivia," earlier in this chapter), survey questions sent to mobile subscribers' phones don't have preconfigured response options, such as multiple choice or true and false. Rather, subscribers are asked a question and invited to send free-form responses. You may ask a mobile subscriber "What's your e-mail address?", for example. When he answers this question, the mobile marketing application automatically sends out the next question, and the process repeats until all the required questions have been sent and answered.



Ask your mobile marketing application provider whether you can chain your survey program, or even your quiz programs, with any other mobile marketing programs you're running. When you chain one program to another, you can do really cool things. Suppose that a user is opting in to your couponing program. If you chain a survey template to the coupon service, you can collect the user's preferences and other personal information before you allow her to opt-in and get the coupon.

## Setting survey options

Your mobile marketing application provider should be able to provide the following configurable options for your survey program:

- ✓ **Number of questions:** Decide how many questions a user must answer to complete the program.
- ✓ **Question order:** Decide whether questions are always delivered in fixed linear order or pulled randomly from a pool of questions.
- ✓ **Question labels:** Make sure that your mobile marketing application allows you to use a configuration tool to label your survey questions. Later, when you data-mine and report on the survey responses, the labels will help you sort and organize the data. (For details on reporting on your programs, see Chapter 14.)

## Choosing a poll type

Following are some of the most common uses of mobile polling and voting:

- ✓ **Television voting/polling:** During the 2008 season of *American Idol* season, the show's exclusive mobile-carrier sponsor, AT&T, reported that more than 78 million votes were submitted over its network. Another popular show, *Deal or No Deal*, uses voting for mobile sweepstakes campaigns. Sports and news shows use polls to discern the opinions of audience members.
- ✓ **Live-event polling and voting:** Increasingly, polling and voting are being used in live events such as sporting events, keynote speeches, and radio broadcasts. The call to action for the poll is placed in traditional media, and people respond. Then the results of the poll are displayed on the stadium's in-venue display screens, on a screen behind the speaker, or on the radio station's Web site.



If you expect high-volume interactions — hundreds of thousands or even millions of messages in just a few hours — be sure to consult your mobile marketing application provider and connection aggregator. They can fine-tune their systems to ensure that high-volume traffic is processed efficiently. Often, in the case of high-volume programs, the marketer opts to turn off the poll's immediate message-response feature so that the mobile marketing application can spend all its time processing poll responses. Responses can be sent after all the poll responses are processed.





Be sure to take time zones into account when you decide when the delayed responses should be sent. You don't want to wake people up in the middle of the night.

## Setting poll options

Your mobile marketing application provider should be able to provide the following configurable options for your poll program:

- ✓ **Question-response format:** Decide which format you'll use for user responses, such as alphanumeric selection (*a, b, c, and d* or *1, 2, 3, and 4*), binary choice (*true* and *false* or *yes* and *no*), or individual items (*red, green, blue, and so on*).
- ✓ **Response message:** Decide whether you want to include poll statistics in your response message (such as "Thank you. You voted *a*, and so did 60% of the other participants"). Ask your mobile marketing application provider whether it can support real-time results in your response messages.

## Discovering Text-to-Screen and Experiential SMS Campaigns

Another popular form of consumer interaction via text is text-to-screen, a simple idea that can create a lot of interaction with live audiences at sporting events, concerts, television broadcasts, and the like. In a text-to-screen program, you place a call to action in traditional media (the giant video screens at a sporting event, a public-address announcement at a concert, or a ticker at the bottom of the TV screen, for example), inviting mobile subscribers to send a text message (such as encouragement for the team or a shout-out to a friend), a photo (such as a picture of a group of friends watching the event), or some other content. When it receives a message of this type, the mobile marketing application places the message in a moderation queue. Then, after the message has been moderated by an automated system or a live person, it's displayed onscreen at the event for a few seconds.

Examples of text-to-screen services go as far back as 2005 in the U.S. When U2 toured the United States in 2005, for example, the band used text-to-screen during shows to support the Live 8 antipoverty initiative. U2 asked audience members to text their names to a short code. The mobile subscribers' names, along with thousands of other participants' names, were displayed onscreen

at the concerts. Later, U2 added up all the names and total participants recorded at all its events and used these figures to show the world that people care about poverty issues.

Another useful application of text-to-screen is to poll audience members during live presentations. For example, an organization out of Chicago, Jarbyco ([www.jarbyco.com](http://www.jarbyco.com)), enables parishioners to text their pastor during sermons. Unlike mobile polls, in which mobile subscribers answer questions, in text-to-screen programs, mobile subscribers ask the questions. You present the call to action during the event, and subscribers text in their questions, which you moderate and display onscreen. Then the presenter can look at the screen and provide answers to the audience. This same capability has been used in live events to provide real-time feedback to speakers, but as you might expect, feedback sometimes distracts the speaker, especially if the feedback is negative. Leading text-to-screen applications providers include Aerva ([www.aerva.com](http://www.aerva.com)), iLoop Mobile ([www.iloopmobile.com](http://www.iloopmobile.com)), Vibes ([www.vibes.com](http://www.vibes.com)), and so on.



Text-to-screen programs can support interactions with almost anyone. During its annual conference in 2008, for example, the Direct Marketing Association offered a mobile concierge service. Attendees could text in their questions (such as “When will the exhibits close?”), and a person in the information booth would text back the answers via a Web browser.



This chapter just scratches the surface of what is possible with SMS. There are so many topics we haven’t covered, including customer relationship management loyalty programs, customer support and care programs, or more advanced secure SMS programs, or “intelligent” programs like those offered by iLoop Mobile and its Smart SMS solution ([www.iloopmobile.com](http://www.iloopmobile.com)).

## Chapter 6

# Sending Multimedia Messages

### *In This Chapter*

- ▶ Understanding MMS capabilities
- ▶ Building an MMS storyboard
- ▶ Formatting MMS content
- ▶ Working with MMS applications and partners

**M**ultimedia Messaging Service (MMS) gives marketers the ability to deliver messages to mobile phones that tell a story with captivating images, sound, and full motion video. You can even use MMS to write long descriptions in alphanumeric text and to include links to mobile Web sites and other stuff without the 160 character limits that SMS messages impose.

In this chapter, we tell you all about using MMS for marketing. We show you how it is different from SMS. We also explain the types of content you can include within MMS messages and how to use this content to script compelling and engaging messages within your mobile marketing programs.

In addition, we show you the types of applications you can use to create your MMS content and explain how it is important for you to use a mobile marketing application provider that specializes in MMS to power your MMS programs. We also show you a number of MMS marketing examples to help stimulate your creative juices on how to use MMS for your business.

## *Comparing MMS to SMS*

*Multimedia Messaging Service* (MMS) can be used to send messages in the same manner as *Short Messaging Service* (SMS), but MMS messages can contain a lot more content because MMS messages aren't limited to 160 characters of text and links as SMS messages are. The MMS messaging standard was created in 2001 after the huge commercial success of text messaging, and today's MMS features continue to grow in popularity every day all over the world.

The next sections explain the differences between MMS and SMS messages. (You can read about SMS in Chapters 4 and 5.)

## *Discovering the content capabilities of MMS*

Compared to SMS, MMS has the ability to send a lot more interesting, engaging, and feature-rich messages that people can interact with. Here are the main content capabilities of MMS:



- ✓ **Text:** You don't have to worry about running out of characters with MMS (and your customers won't have to learn some new teenager language that allows meaningful expression within 160 text characters). You can include a practically unlimited amount of text (up to several thousands of characters) in an MMS message. Additionally, you can format your text in many ways, from adding color to changing fonts and styles.
- ✓ **Images:** This is the most familiar type of MMS message for personal communications. People love to take pictures with camera phones and send them immediately to friends and family. For mobile marketers, you can send images and have them integrated into an MMS delivered directly to your customers' mobile phone inboxes. As you know, a picture is worth a thousand words, so inserting a compelling picture truly helps to get your message across!  
  
Think about all of the ways that adding images can help you communicate with your customers. You can send out a message with your logo in it, which helps to distinguish and showcase your brand. Or, you can send a picture of the new product — the hot new shot — that you want people coming to your retail store to shop for!
- ✓ **Audio:** MMS messages can include audio clips that play like a soundtrack during a slideshow, or the sound can be inserted as a standalone feature of the message.
- ✓ **Animations:** MMS technically functions like a slideshow, so animations look great in an MMS (imagine flipping through a flip book). These animations can range from animated icons, cartoon figures, or rotating images and are easily assembled into an MMS. An animation can be created in either an animated GIF file or video format and delivered to a phone as an MMS! (An *animated GIF* is a series of images displayed one after the other, like an animation. They look just like you are watching a slideshow or movie.)
- ✓ **Video:** Nearly all MMS-enabled phones can receive video files. You should use an application like Final Cut Pro, iMovie, or QuickTime Pro to encode your video clips in H.263 and MPEG-4 formats, which ensures

that your MMS video message will have compatibility with most devices. MMS messages can contain a lot of content, but file sizes are not unlimited. Make sure videos are no more than 15 frames per second and roughly 30 seconds in length. This ensures that the video can be delivered to nearly all MMS-enabled phones and that it's still high quality enough for the person who receives it to enjoy it on her phone! Check out the manual of your software application to understand how to save your content in these recommended formats (Hint: With most programs, you typically use the Save As for Web or Export feature.)

## *Examining MMS compatibility and reach*

Although SMS text messaging has the greatest reach of any form of mobile messaging in the U.S., MMS is not far behind. Of the 230 million folks in the U.S. who send text messages today, roughly 85% of them (or 200 million) can send and receive MMS messages. For us marketers, 200 million is a big number — it's twice the size of the audience who watched the 2010 Super Bowl!



Most consumers do not need a data or Internet plan (that is, a contract with their carrier to connect to the Internet or download applications from their phone) to send and receive MMS on their phones — MMS messages are considered part of the text messaging plan provided by wireless carriers.

In 2009, consumers were sending about 5 billion MMS messages per month in the United States, compared to around 1 billion SMS text messages per day. (By March 2010, more than 5 billion text messages were sent daily in the U.S.) The important thing to note is that enough people are using MMS to make it worth a marketer's while to invest in MMS messaging.

There are two types of MMS-capable phones: those that just receive pictures and those that receive all forms of MMS, including pictures, video, and audio files. When MMS was brand-new (way back in 2003), most phones could only receive pictures via MMS. In 2010, 95% of MMS-capable phones can now receive all forms of MMS messages, enabling everyone, including consumers and marketers, the full suite of multimedia options when creating MMS mobile marketing campaigns.



If you want to know whether your customers are capable of receiving your MMS marketing messages, ask them if their mobile devices take pictures. If the answer is yes, your customers probably have MMS-capable phones (some devices without a camera may accept MMS, but they're few and far between). The mobile phone manufacturers started years ago to integrate MMS capability into nearly all their phones (not just the high-end ones) that they ship. Only a handful of phones still around today in the U.S. can't receive MMS.

## Paying attention to MMS pricing

Starting in 2008, nearly all the wireless carriers in the United States made one significant change that jumpstarted the MMS mobile marketing industry. (MMS has been in Europe since the early 2000s.) The wireless carriers decided to charge consumers the same rate for MMS as they did for SMS messages if they had a text messaging plan (which most mobile users do today).

Prior to this change, you were charged an extra fee to receive a picture or video message on your phone. Fortunately, this change enabled all messages to be treated equally (regardless of size, content, or type, a message is a message), which means that mobile marketers can deliver video to consumers via MMS for the same price as a text message! Because people love telling stories with visuals and sounds, marketers can now get much more creative with personal and business communication using MMS.

Even though the pricing for consumers has been lowered so that the cost to a *consumer* to receive an MMS is the same as that for receiving a text, mobile *marketers* do pay a tiny bit more to send MMS messages to their customers. (It's like why those rental car places charge us a little more to drive the luxury car with a GPS unit versus an economy car with manual windows!) Fortunately, the price difference isn't too great. Many marketers find it a small price to pay to send a message with color, action, sound, and even animation!

On average, MMS message campaigns cost from 25–50% more than a standard SMS campaign. Using do-it-yourself tools (see the section titled, "Delivering your MMS content" elsewhere in this chapter), you can expect to pay roughly \$.10–\$.20 to send an MMS to one of your customers versus about \$.05–\$.10 for an SMS message.

## Preparing Your MMS Campaign

Setting up an MMS mobile marketing program can be simple, although it is more complicated than just setting up a similar text messaging-only campaign (as we discuss in Chapters 4 and 5). To properly execute an MMS mobile marketing campaign, you need the following:

- ✓ Properly formatted and scripted content files.
- ✓ An MMS application (a software solution) to create your MMS message.
- ✓ An MMS mobile marketing partner to manage your campaign and help you deliver it to your customers. (Believe us; you don't want to try this on your own.)



Putting together an MMS message is a lot like putting together a slide presentation or a commercial. Your MMS messages can be as simple as one static image, or as intricate as a series of fully interactive images, movie clips, and sounds, as shown in Figure 6-1.

**Figure 6-1:**  
MMS  
messages  
can include  
multiple  
media  
in one  
message.



*Powered by Mogreet. Courtesy of the  
Mobile Marketing Association*



Don't think of MMS messages as simply a way to deliver a message. Instead, MMS gives you the opportunity to tell a complete story. In the following sections, we explain how you can quickly and easily set up an MMS-based mobile marketing campaign.

## *Putting your MMS storyboard together*

A storyboard is like a map of your entire MMS message that includes a beginning, a middle, and an ending — just like a story. You need to use a storyboard to explain to the person or company who is building your MMS message what you want your message to say and how you want it to look.

Creating a storyboard is easy. All the best stories start with one — even Steven Spielberg and Alfred Hitchcock created them before finalizing their masterpieces! Yours doesn't have to be this intricate, though. All you need is a pencil, a pad of paper, and a little imagination to get started. If you want to use a computer application to do your storyboard, several are available, such as StoryBoard Pro Software by Atomic Learning. You can download it for free from [www.atomiclearning.com](http://www.atomiclearning.com).

To create a storyboard, write or draw the story in frames or scenes, just like a comic book. Be creative and try to visualize how you want your message to grab your customer and how the story should flow from one scene to another. For example, imagine if you were starting a band and wanted to create an MMS message to send to your fans to tell them to buy tickets to tonight's show. The first scene of the storyboard might open with an image of you backstage and a hint of music playing in the background. The next scene includes an image of the band tuning up their instruments and slightly louder background music. The final scene has music at full volume, an image of a crowded nightclub, and the band on stage with a call to action to come see the band tonight! You get the idea.

Here are a few other things you should include in your storyboard to make sure that your MMS message is as effective as it is attractive:

- ✓ **Determine the purpose of your story.** Are you trying to entertain, inform, or drive a specific action (like encouraging someone to buy something)?
- ✓ **Think about how to tell your story in 30 seconds or less.** Because the size of the message has some limits, you've got about thirty seconds total to tell your story.
- ✓ **Include a call to action in your storyboard.** Make sure your MMS message tells your customers the action that you want them to take. (For example, come see my band, or come check out the sale at my store!) This call to action should be simple, strong, and easy to remember so that you leave a lasting impression on your customer!

## *Collecting and formatting your media*

Before creating your MMS, you need to collect or create the images, text, music animations, and video that will make your story engaging. When creating a series of media animations for an MMS, select the pictures that you want to weave together into a mini story and use an application like Corel's Paint Shop Pro ([www.corel.com](http://www.corel.com)) or Adobe Photoshop or Adobe Illustrator ([www.adobe.com](http://www.adobe.com)) to convert it into an animated GIF.

If you want your animations to look like a video, you can use a video editing program like Apple's iMovie or Final Cut Pro ([www.apple.com](http://www.apple.com)) to convert the animated GIF into a mobile video. Eventually, when you create your MMS, it will look like you're reading a flipbook as the slideshow appears before your eyes. Keep in mind, however, that your MMS application provider will probably have to adjust or modify some of your files to ensure they are compatible with market requirements. Ask your application provider whether creating your own media will save you any time or money before you do it yourself.





When creating an MMS, the video part of an MMS should be around 200KB in size for optimal performance across the majority of mobile devices and networks. Here's why: In the process of creating an MMS, a few components are added to create the MMS, which doubles the size of the total file. Think of the process as like shipping a valuable item across the country. Before you ship it, you need to surround it with packing peanuts and put it in a secure box before dropping it off at the post office. The packing peanuts make your package a little heavier. MMS works the same way: Your video gets bigger as an MMS wrapper is assembled to protect the MMS and deliver it to a mobile phone. Most carriers require that videos are smaller than 400KB for MMS, so make sure your video is less than 400KB (shoot for 200KB for the fastest delivery); otherwise, it might not get delivered!

If you're using an application provider to create and send your MMS messages, they may also offer creative services. In that case, you won't have to build the message yourself, but you should still script the message out to the best of your ability using a storyboard. That way, you can ensure that your application provider understands what you want your message to look like and what your message is supposed to accomplish.

## *Delivering your MMS content*

After you have your message put together, you can either give your media files to your application provider, or build your MMS message on your own using a do-it-yourself application or partner.

Here are the two ways to set up and deliver your MMS mobile marketing campaign:

- ✓ Use a do-it-yourself (DIY) program to enable you to create your own MMS messages and deliver them to a list of recipients.
- ✓ Use an application provider to execute the program on your behalf.

If you want to give it a go on your own, check out do-it-yourself tools such as Mogreet ([www.mogreet.com](http://www.mogreet.com)). With a DIY tool, you can upload your media and have it assembled by the software application into an MMS message. With these applications, all you need are the media files and your story layout, and you are ready to go, as shown in Figures 6-2 and 6-3.

**Figure 6-2:**  
The  
Mogreet  
MMS tool  
enables you  
to upload  
your video  
in standard  
formats.



*Courtesy of Mogreet*

**Figure 6-3:**  
DIY  
applications  
let you  
preview  
your MMS  
messages.



*Courtesy of Mogreet*



Do-it-yourself applications are great for simple MMS messages, and for sending them to small groups of people. DIY-minded small businesses and early adopters looking to take advantage of the benefits of MMS should try the applications from Mogreet or CellySpace ([www.cellyspace.com](http://www.cellyspace.com)).

Don't want to do it yourself? Given the complexity of actually creating an MMS and the emerging nature of the DIY platforms, hiring an application provider isn't a bad idea, especially when you consider the fact that the application provider typically has expertise to share.

For those creating more customized MMS messages, looking to send out large volumes of MMS messages, or needing some help with the creative work, contacting an MMS application provider is the way to go. The application provider can help you with

- ✓ Obtaining and managing carrier approval processes for your program. (See Chapter 3 for more on the rules and regulations of mobile marketing.)
- ✓ Obtaining the use of a common short code or getting your own if you need to send a lot of MMS messages. (See Chapter 4 for understanding common short codes.)
- ✓ Managing the formatting and delivery of the content and customizing it for the many different types of cellphone carriers and handsets out there. (For example, delivering an MMS message to an Apple iPhone is much different than delivering it to a Motorola RAZR.)
- ✓ Targeting MMS messages for specific subgroups of customers. (For example, your MMS message to your customers with iPhones could include a link to download your iPhone application, which you would want delivered to iPhone customers only. All your other customers could receive a different MMS message.)
- ✓ Tracking the success of your campaign and building a database of your customers' mobile phones.

Because this is pretty complicated stuff, only a handful of companies can help you with your MMS marketing campaign. We recommend using established players such as Mogreet ([www.mogreet.com](http://www.mogreet.com)), Hook Mobile ([www.hookmobile.com](http://www.hookmobile.com)), or Skycore ([www.skycore.com](http://www.skycore.com)).



Make sure you test your MMS before you mass-send it. Keep in mind that an MMS will look different on, say, an iPhone versus a BlackBerry. Make sure that the message you use in your MMS makes sense given how your customers will actually see the message. For example, don't say, "Watch the video" in the text portion of your MMS if your video automatically plays when they open the message before they see the written content. Your MMS provider can help you manage the delivery of MMS to different device platforms.

## *Sending Common MMS Campaigns*

MMS marketing is rather new, so you need to be creative when considering the utility of MMS to drive customers to your business. Some MMS marketing campaigns, however, are tried and tested. Starting with a few “typical” MMS campaigns keeps you from wasting time, energy, and money on messages that don’t work. The following sections show you three MMS marketing ideas that have been used by lots of companies with great success so you can see the features and benefits of each and apply them to your business and your future MMS strategy.

### *Sending MMS greeting cards*

Greeting cards, shown in Figure 6-4, are by nature perfectly suited to MMS delivery because they feature animated content and evoke personal emotions. Best of all, they can be delivered instantly to a very personal place — the recipient’s phone!

**Figure 6-4:**  
MMS  
greeting  
cards are  
a personal  
and fun way  
to reach  
out to  
customers.



*Courtesy of Mogreet*



Sending a greeting card is a great way for businesses to connect with their customers in a very thoughtful and unobtrusive way. Many businesses who send out paper greeting cards during the holiday season are switching to mobile because they are cheaper than sending paper cards with \$.40 stamps and they are more personal than electronic greeting cards delivered to a shared computer or e-mail inbox. Here are some tips to remember when creating mobile greeting cards:

- ✓ **The content of your greeting cards should be focused on building a relationship, not just selling.** That being said, be sure to include all your company's contact information, including your phone number and your Web site address.
- ✓ **Keep your messages personal, but not too personal.** For simplicity's sake, target the content of your message to a group but make it generic enough to allow you to send the same message to all your customers within that group. For example, you might be able to send the same golf-themed greeting to all the golfers in your customer database without personalizing every single message.
- ✓ **Get the timing right.** Holidays are easy to time, but birthdays, anniversaries, and thank-you cards sent after a purchase must be individually timed. You can schedule reminder greetings using some DIY MMS tools, or you can provide the dates in your database to your MMS application provider.



Remember that including unlicensed content from someone else could get you in trouble. Contact the owner of any footage you plan to use in your mobile greeting cards before using it. You can visit content licensing libraries online, like Creative Commons ([www.creativecommons.org](http://www.creativecommons.org)), to find tons of content to include in your messages.

### Be my mobile Valentine

On Valentine's Day, 2010, American Greetings customers sent and received mobile greeting cards to every state in the United States and in Canada! This means that people in every part of the U.S. were sending and receiving mobile greetings!

## *Running picture-to-screen campaigns*

Picture-to-screen campaigns enable your customers to take pictures with their phones and send them into a short code to be instantly posted on a digital screen. That digital screen could be as simple as a single television screen in your store or as complex as multiple digital billboards in sports stadiums all over the country.

Several picture-to-screen applications are being used today because they get audiences excited and engaged in an activity surrounding a promotion, while also having a viral element to them. Some of the more compelling applications of picture-to-screen campaigns include the following:

- ✓ **Displaying picture messages from the crowd at sporting events, concerts, and nightclubs:** For example, a beverage company might ask people to send a picture of them drinking their product in order to win a prize.
- ✓ **Displaying pictures from the viewers of TV shows to increase audience participation:** For example, a television show host might ask people to send pictures of themselves using a specific product and the pictures could be displayed at the bottom of the television screen (after someone reviews them, of course).
- ✓ **Displaying news and information through citizen journalism and live mobile blogging:** For example, consumers could send pictures and videos directly from their phones to Web sites with the latest local news, weather, or traffic. Check out CNN's iReport ([www.cnn.com/ireport](http://www.cnn.com/ireport)) or Allvoices ([www.allvoices.com](http://www.allvoices.com)) to see examples of citizen journalism in action today!

To set up a picture-to-screen campaign, pick a location where your customers can post and view the pictures they create. This could be a screen in your store or a more public venue. Many retailers now (from Wal-Mart to Nordstrom's to EBGames) have digital screens in their stores, which can showcase the picture-to-screen campaigns.

To get the word out about your picture-to-screen campaign, you can use the digital screen to tell people how to send the pictures. For example, your screen could say "Text a picture of such-and-such product to 21534 to be entered into a contest to win free season tickets!"



Picture-to-screen campaigns are usually best for getting people engaged in an advertising message, but they can also be used to capture mobile phone numbers from people. If you use picture-to-screen campaigns to collect phone numbers, make sure your opt-in message complies with carrier regulations and is part of a joint campaign. You can read more about mobile opt-in regulations in Chapter 3.



The process of receiving pictures in from a mobile phone, filtering them (because some consumers send pictures that you don't want posted on public screens), and posting them on a digital screen is a very technical process. We strongly recommend that you contact an application vendor to have them guide you through it for maximum success.

Companies that can help you set up a picture-to-screen campaign right away include TxtStation ([www.txtstation.com](http://www.txtstation.com)), MangoMobile ([www.mangomobile.com](http://www.mangomobile.com)), Phizzle ([www.phizzle.com](http://www.phizzle.com)), Aerva ([www.aerva.com](http://www.aerva.com)), Telescope ([www.telescope.tv](http://www.telescope.tv)), and Mogreet ([www.mogreet.com](http://www.mogreet.com)).

## *Creating MMS coupon promotions*

Imagine the power of a coupon that includes a full video of the product in action or a testimonial of someone who used the product. Mobile coupons are a fast-growing way to deliver special deals to your loyal customers, and sending mobile coupons with MMS gives your coupons an instant upgrade to interactivity.

Make sure your coupon includes instructions for redeeming the offer and think about how you plan to track the offers before you create the coupon. MMS coupons can be redeemed in any of the following ways:

- ✓ By showing the coupon to the clerk in a store.
- ✓ By including a promotional code in the coupon. This could be a link with special tracking code or a number that needs to be entered into a mobile Web site. If you want your customers to view the entire MMS message, ask them to listen or watch for the secret symbol or word in the message and then use that word or message to redeem the offer.
- ✓ By asking your customers to take the same action shown in the MMS message. For example, the MMS message could teach the viewer a jingle that needs to be sung by the customer in the store in order to receive the offer.
- ✓ By asking the viewer of the message to take action on their mobile phone in response to the message. For example, you might ask them to send a text message or a picture to a short code or call a phone number shared in the message.



Businesses doing MMS promotions should remember not to over- or under-communicate with your customers on their mobile phones. If your customer has opted in, they expect to receive regular communication from you. Most MMS marketers send out offers one to four times per month and constantly change them to make them fresh and interesting to their customers.



Because MMS campaigns are affordable relative to other forms of marketing, and because MMS messaging is somewhat new, you should create a few different ideas and test them against one another. That way, you can easily see if one idea has better results than another and apply what you find out from this research to your next promotion.





## Chapter 7

# Mobile E-Mail Marketing

---

### *In This Chapter*

- ▶ Comparing mobile e-mail to other mobile communications
  - ▶ Dealing with mobile device display issues
  - ▶ Building your e-mail list using mobile devices
  - ▶ Designing mobile-friendly e-mail content
  - ▶ Including mobile-friendly calls to action in your e-mails
- 

**I**n the early days of mobile e-mail, if you wanted to make sure people on mobile phones could read your company's e-mail newsletter, you had to send some sort of text-only version of the pretty-looking HTML e-mail you sent to your customers' computers. That's changing fast. Mobile phones and the programs that run on them are getting sophisticated enough to display complex HTML and standardized enough to ensure that your e-mails look basically the same on a majority of devices.

Don't relax yet, however. You need to do more than just worry about getting your e-mails to look good. You also need to make sure your e-mail content is accessible on multiple platforms like computer-based e-mail programs, Web-based e-mail programs, and even social media sites. You also need to be able to utilize other forms of mobile communication to build your e-mail list and ensure that your mobile e-mails are actionable through mobile devices so your customers are able to make purchase decisions without waiting until they're in front of a computer.

This chapter shows you how to make changes to your overall e-mail marketing strategy so your e-mails get results when they're viewed on mobile devices. To find out how to build your overall e-mail marketing strategy, get your hands on *E-Mail Marketing For Dummies*, by John Arnold (published by Wiley).

## Getting a Grip on Mobile E-Mail

Think of e-mail marketing as one of many forms of mobile communication with certain advantages and disadvantages. Table 7-1 compares the main forms of mobile communication so you can understand where mobile fits into your strategy.

<b>Table 7-1</b> <b>E-Mail Compared to Other Forms of Mobile Communication</b>				
	<b><i>Mobile E-Mail</i></b>	<b><i>Text Messages (SMS or MMS)</i></b>	<b><i>Social Media</i></b>	<b><i>Really Simple Syndication (RSS)</i></b>
Delivery Options	Mass delivery to private inboxes and one-to-one personalization are possible.	Mass delivery to private inboxes and one-to-one personalization are possible.	Mass delivery is public. Personalized delivery to private inboxes is manual.	Mass delivery is public. Personalization is a challenge because opt-in is often anonymous.
Delivery Rates (% of Messages That Are Delivered Correctly)	E-mail delivered by a good e-mail marketing provider can exceed 97%. Filters and changes to e-mail addresses can degrade deliverability.	Assume 100% delivery. Carriers control opt-in and delivery gateways, so filtering is low. People don't change mobile phone numbers as often as e-mail addresses.	Mass messages are posted rather than delivered and anyone can view them. People can easily unfollow and ignore posts.	Mass messages are posted rather than delivered, and anyone with an RSS reader can view them. People can easily unsubscribe and ignore posts.

	<b><i>Mobile E-Mail</i></b>	<b><i>Text Messages (SMS or MMS)</i></b>	<b><i>Social Media</i></b>	<b><i>Really Simple Syndication (RSS)</i></b>
Audience	Almost everyone uses e-mail and people can easily make the transition from reading e-mail on a computer to reading e-mail on a mobile phone.	Usage is increasing rapidly for users older than 30 and text messaging is a standard for most people younger than 25. More than 95% of phones on the market can send and receive text messages.	Once popular only with young audiences, social media usage is now widespread. Few people, however, consider social media to be their primary form of communication.	Fewer than 15% of consumers realize they use RSS*, but the technology is used to enable many familiar blogging functions like feeding a blog post to other Web sites or posting someone else's content to your own blog or social media page.
Building a List	Obtaining e-mail addresses and permission is required. Confirmed opt-in is not required, but it's still a good idea.	Obtaining mobile phone numbers and permission is required. Confirmed opt-in is required by all the carriers.	Obtaining personal contact information not required. Permission is inherent in the decision to follow your messages.	Obtaining personal contact information not required. Permission is inherent in the decision to follow your messages.

(continued)

**Table 7-1 (continued)**

	<b>Mobile E-Mail</b>	<b>Text Messages (SMS or MMS)</b>	<b>Social Media</b>	<b>Really Simple Syndication (RSS)</b>
Formatting	Nearly unlimited text and graphic designs are possible. A variety of links and images can be included.	Text limited to 160 characters and graphic design limited to images. Links are subject to character limits.	Text limited on some sites, such as Twitter. Limited graphic design. Links to files and downloads are limited.	Limited text and graphic design unless the reader clicks through to the source of the feed. Links to files and downloads are limited or not included in the feed.
Cost	E-mail service provider recommended. Flat-rate and per-message plans available at fractions of pennies per message.	Service provider required. Per-message plans start at around \$.10 per message and go lower based on volume.	Going direct to each social media site is free. Service provider is required to manage multiple sites and audiences. Costs are minimal.	Service provider or programming skills required. Most services are free or very low cost.

*\*According to a ClickZ report*

E-mail is perfect for sending highly personalized, targeted, private, and interest-specific messages to a large number of people at once. You can include links to files, Web pages, and other content, and you can control your brand identity with colors, images, and text formatting. You can also deliver e-mail to personal inboxes on a mass scale. This means you can reach a lot of people efficiently, and your recipients are more likely to pay attention to your e-mails because they sit in an inbox until they're opened or deleted.



The advantages and trade-offs of e-mail don't end with the utility of e-mail as a form of communication. You need to manage several technical issues in order to be effective in mobile e-mail marketing. The next sections show you how to think through the technical challenges and deal with them.

## *Dealing with devices and browsers*

Looking at an e-mail address won't tell you whether the person on the other end is going to be looking at a computer screen or a mobile phone screen when they read your e-mail message. Most people with mobile e-mail can access the same inbox from their phone and their computer.

This poses a challenge to e-mail marketers because some e-mail characteristics are more desirable for a person in front of a computer than for a person in front of a mobile device, and some e-mail characteristics that are possible to view on a computer are impossible to view or interact with on a mobile device.

For example, sending an e-mail newsletter with three columns of text could look great on a big computer screen, but it's really hard to read on a three-inch mobile screen (see Figure 7-1). Similarly, sending an e-mail that contains a link to purchase a product might get an immediate response when recipients are in front of a computer, but cause frustration for those who discover that they can't make the purchase via their phone because the technical capabilities of the phone or the online store are limited.

Here are the four technical issues that affect the ability to interact with e-mails on mobile devices, followed by a few tips for dealing with them (or at least tolerating them):

- ✓ **The device:** Some native device characteristics make it difficult to interact with e-mail. For example, a device without a touchscreen can make clicking on a link frustrating or even impossible. Even if you know the capabilities of every device used by every one of your customers and you can somehow keep that information updated when your customers change to another device, it's next to impossible to design an e-mail that allows seamless interaction on every device. Besides that, it's not practical to design a different e-mail for every device. That defeats one of the main benefits of e-mail, which is mass delivery.



**Figure 7-1:**  
Some e-mail  
designs  
are more  
friendly  
to mobile  
devices  
than others.

*Courtesy of ConstantContact.com*

- ✓ **The operating system or browser on the device:** Device manufacturers install software on their phones so the phones will function. Some phones, like iPhones, Google Android phones, BlackBerry phones, and Palm phones have their own operating systems. Other phones manufactured by companies like HTC and Motorola could be using Windows Mobile or software installed by the carrier who provides service to the customer. To make matters worse, some phones install standard Internet browsers like Safari, Firefox, or Internet Explorer to display HTML designs, whereas other operating systems aren't capable of displaying HTML at all. Every operating system and browser has the potential to display your e-mails differently or disable some functions you build in to your e-mail's HTML.
- ✓ **The e-mail program being used:** Even if you have a group of people using the same phone and the same operating system, the program they use to read their e-mail might be completely different and cause your e-mail to encounter variations in functionality. For example, some

people with an iPhone might check their e-mail using iMail, whereas others using the same device and operating system use Outlook so they can synchronize their corporate e-mails. The programmers who build the e-mail programs we use make decisions based on their perception of usability, and those decisions aren't always good for everyone, let alone based on the same standards. For example, one programmer might decide to limit all incoming e-mails to the first 150 characters until the recipient decides to download the whole message, whereas another decides to allow everything to display as soon as the e-mail is opened. This isn't just a mobile e-mail challenge. E-mail marketers have been struggling with variations in standards among e-mail programs like Outlook, Hotmail, Gmail, Yahoo!, and AOL for as long as HTML e-mail has been around.

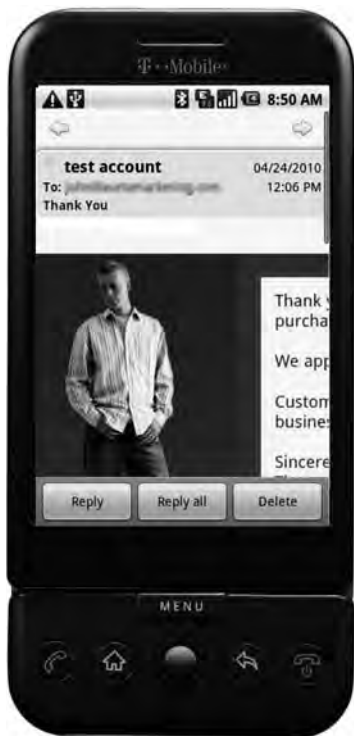
- ✓ **The HTML format of the e-mail:** When building an e-mail for mobile, you can't assume that the HTML will work the same way as the HTML in your Web site works. For example, e-mail programs don't read JavaScript, and they won't display form fields either — even on computers. Your HTML also dictates the width of the e-mail, the placement of links, and the design and formatting of your e-mail, all of which can be wrong or right, depending on the other aforementioned issues. For example, setting your e-mail width at 600 pixels wide might work well for a computer, and for mobile devices with zoom capabilities, and e-mail programs that automatically resize HTML pages to match size of the mobile screen. However, phones with 150 pixel screens and no ability to zoom or scroll sideways will hide 450 pixels of your e-mail from view (see Figure 7-2).



The aforementioned technical issues result in an almost unlimited number of possible device, operating system, and e-mail program combinations. Don't worry about designing an e-mail for every combination, however. The geeks (like us) who invent this stuff want consumers to have great experiences when viewing e-mails, and they won't expect the business world to conform to a wide variety of non-standards. Standards are emerging, but it's going to take time. Put the following advice to work while you wait for industry standards to emerge for displaying HTML e-mails on mobile phones (you won't have to wait too long):

- ✓ **Use an e-mail marketing provider (EMP) to build and deliver your e-mails.** These companies build tools that include the latest standards and give your e-mails the best chance of successful interaction. Many of the top e-mail services are experts in mobile e-mail design and delivery, and some even provide tools that allow recipients to select and view mobile versions of your standard e-mails. You can read more about EMPs in the next section.

**Figure 7-2:**  
E-mails  
that are  
wider than  
the mobile  
screen may  
hide your  
e-mail  
content.



*Courtesy of ConstantContact.com*

- ✓ **Collect e-mail preferences at sign-up and group your recipients.** Grouping recipients by device, operating system, or e-mail program gives you too many groups. Instead, use a few groups like iPhone users or non-iPhone users. Alternatively, at sign-up, ask your customers if they prefer e-mails formatted specifically for mobile phones versus computers and then set them up accordingly. Flip ahead to the section called, “Choosing a Mobile E-Mail Design Approach” for more information about the challenges of grouping subscribers.
- ✓ **Be patient and wait for the standards to emerge.** Your customers are probably well aware of the limitations of their personal devices. Use the tips in the following sections to make things as standard as possible until the day when the vast majority of phones can read your e-mails with negligible variations in interactivity.



## Choosing an e-mail marketing provider (EMP)

Design standards, spam filters, firewalls, junk folders, and consumer distrust are all reasons to turn to professionals for help with your e-mail strategy. *E-mail marketing providers* (EMPs) are companies that provide one or more of the following commercial e-mail services:

- ✓ Improved e-mail deliverability
- ✓ Database and list management
- ✓ E-mail template design
- ✓ E-mail message and content creation
- ✓ Tracking reports
- ✓ Advice and consulting



EMPs allow you to accomplish much more with your e-mail marketing than you otherwise could on your own. Some EMPs even provide various levels of outsourcing for higher prices if you don't want to do your own e-mail marketing. Here are a few examples of the kinds of benefits that EMPs provide for delivery to mobile phones:

- ✓ **Give your business a professional look:** EMPs can help you create great-looking e-mail communications without programming knowledge. Most EMPs provide templates with consumer-friendly layouts to accommodate any type of message. Some EMPs provide mobile-friendly templates with additional mobile features such as links to mobile versions of your e-mails (see Figure 7-3). Template-creation wizards allow you to control all your own design elements for a low cost, and some EMPs either include professional services to help you with semi-custom designs or allow you to completely outsource and customize your template designs. Here are some of the templates that EMPs usually provide:

- Newsletters
- Promotions
- Announcements
- Press releases
- Event invitations
- Greeting cards
- Business letters



Many EMPs offer custom templates designed for your specific needs, for an additional fee, of course. Sometimes the templates offered don't suit your needs, but this can be a helpful alternative for you if the price (and the template) is right for you.



Link to mobile version

**Figure 7-3:** EMPs can provide templates with links to mobile-friendly e-mail versions.

*Courtesy of ConstantContact.com*

✓ **Keep your marketing legal:** EMPs are required to take current e-mail laws into consideration to make sure customers can easily comply. Reputable EMPs take compliance a step further than the basic legal requirements and adhere to more professional standards that reflect consumer preferences. Examples of professional standards include the following (for more information about laws governing e-mails, see Chapter 3):

- Safe one-click unsubscribe links
- Privacy statements
- Physical address added to e-mails
- Sending from a verified e-mail address

✓ **Help you with logistics and reporting:** EMPs can help you manage the data and feedback associated with executing your e-mail strategy. Here are some examples of ways EMPs can help you manage your information:

- Storage and retrieval of subscriber information
- Reports on deliverability
- Automated handling of subscribe and unsubscribe requests
- Tracking information on blocked and bounced e-mail

✓ **Help with content:** EMPs want you to be successful because if your e-mail messages are effective, you'll likely reward your EMP by being a loyal customer. Many EMPs have resources available that help you develop your content and use best-practices. Examples include

- Online communities
- Webinars
- Tutorials
- Classroom-style training
- Consultation

✓ **Teach you best practices:** EMPs can give you valuable information on consumer preferences that would be too expensive or impossible for you to obtain on your own. EMPs send a lot of e-mails on behalf of their customers, and they're good at staying up-to-date on consumer preferences and professional standards. Some EMPs are willing to share their knowledge to make your e-mails more effective. Some things you might find out include

- Best times and days to send
- How to improve your rate of e-mail actually opened by recipients
- How to avoid spam complaints
- What to do when e-mail is blocked or filtered
- How to design and lay out your content



EMPs come in a variety of do-it-yourself and outsourced models. If you choose to do it yourself, remember that you'll likely need to engage with other services, such as mobile Web site design and text messaging services, to enable the full extent of mobile interaction with your e-mails. If you have the budget to outsource some or all of your e-mail marketing activities, look for an EMP with expanded capabilities or a marketing agency who has an integrated partnership with an EMP and the other services you need.

## Collecting E-Mail Addresses through Mobile Devices

A quality e-mail list represents a very personal and direct line of communication with customers and prospects, and mobile devices represent an opportunity to collect e-mail addresses on-location. Building a quality list is also challenging because you need to make sure that everyone on your list wants and appreciates your e-mails. Otherwise, you'll be sending unwanted communications and inspiring all kinds of negative attitudes toward your business. (In other words, people will get mad at you.)



Before focusing on e-mail address collection through mobile devices, make sure you're ready to adhere to legal and professional permission standards. See Chapter 3 for more details on the legalities and standards of mobile communications, including e-mails.

All of the following methods of mobile e-mail address collection are worth employing in your business. They imply gaining permission as an inherent part of the process of exchanging e-mail address information.

### *Texting in an e-mail address*

Use your advertising to ask customers and prospects to text in their e-mail address. Here are two ways to ask for e-mail addresses by text message:

- ✓ **Ask people to text their e-mail addresses to your mobile phone number.** If you don't expect a lot of volume or can't afford a short code or text messaging platform, this method allows you to accept e-mail addresses from people on your mobile phone and add them to your address book so you can send them e-mails. It's highly manual, and you have to share or advertise your own mobile phone number, so we don't recommend this method.
- ✓ **Ask people to text their e-mail addresses to your short code.** To enable this for your business, make sure your text messaging application is set up to populate your database with e-mail addresses sent by text. If you have a dedicated short code, you can ask people to text their e-mail addresses to your short code. Your platform's database can automatically recognize the e-mail addresses and put that information in the proper database fields for you, as shown in Figure 7-4. If you use a shared short code, you need to ask people to include your keyword along with the e-mail address as in "text *KEYWORD* e-mailaddress to 12345," where *KEYWORD* is your short code keyword, and 12345 is your shared short code. (You can read more about short codes and keywords in Chapter 4.)

**Figure 7-4:**  
Some text  
messaging  
databases  
can recog-  
nize e-mail  
addresses.

The screenshot shows a web browser window displaying the Movitas website. The page title is 'movitas • Email Marketing • Welcome EMail'. Below the header, there's a navigation bar with links like 'Send Your Mail', 'Send Message', and 'See Your Account'. The main content area is titled 'Create a New Message Campaign'. It features two columns of forms. The left column is for a 'Mobile Tag Campaign' and the right is for a 'Direct Message Campaign'. Both forms have sections for naming the campaign, scheduling it, and selecting recipients. The 'Mobile Tag Campaign' form also has a 'Join Campaign' section at the bottom.

Courtesy of Movitas.com

## *Providing forms on mobile Web sites*

Your mobile Web site should include a sign-up form so people can join your e-mail list from their mobile phone, as shown in Figure 7-5. List the domain name of your sign-up form in all your ads (for example, [www.yourcompany.com/sign-up](http://www.yourcompany.com/sign-up)). Keep your sign-up form short. Remember that the person signing up might be typing on a very small keyboard. Ask for an e-mail address, first name, and allow them to select an appropriate list. You can collect additional information later.

**Figure 7-5:**  
Put an  
e-mail list  
sign-up  
form on your  
mobile Web  
site.

A screenshot of a mobile web browser displaying a sign-up form. The form has a dark background with white text. At the top, it says 'tír na nóg' in a stylized font. Below that, there are four input fields: 'First Name', 'Last Name', 'Email', and 'Mobile Phone'. At the bottom, there are two checkboxes: 'Email' and 'Text Message'. The browser's address bar shows 'http://www.movitas.com'.

Courtesy of Movitas.com

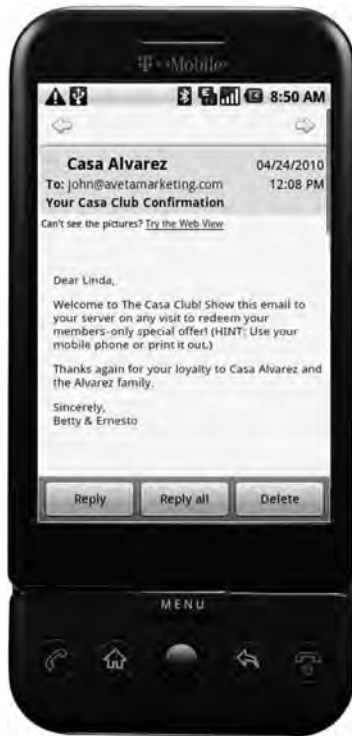
## *Capturing addresses through mobile e-mail*

Because e-mail is available on a lot of phones, your advertising can ask people to send any e-mail to a special e-mail address that automatically responds by confirming a subscription. For example, you might ask people to send an e-mail to `subscribe@yourcompany.com`. When you receive the e-mail, you can add that e-mail address to your database.

Make sure your advertising clearly spells out the fact that the e-mail address is used to sign people up for marketing e-mails and sets expectations for content and frequency. You should also set the expectations in a confirmation e-mail sent in reply to the subscription e-mail, as shown in Figure 7-6.

## *Using mobile applications to collect e-mail addresses*

Some e-mail marketing providers have applications for your phone that help you to collect e-mail addresses when you're not in the office. That way, if you have your mobile phone on you, you can add someone directly to your e-mail database when he is standing right in front of you. An example of an e-mail address collection application is shown in Figure 7-7.



**Figure 7-6:**  
Send a confirmation e-mail when someone signs up for your list.



**Figure 7-7:**  
Some mobile apps allow you to collect e-mail addresses in person.

*Courtesy of ConstantContact.com*

## Protecting your e-mail list

A quality list of permission-based e-mail subscribers segmented by interest and behavior is something to be proud of. Lists and data are assets and represent a significant competitive advantage to your business.

When it comes to e-mail data, protecting your assets is as important as building it in the first place. Don't violate the trust of your e-mail list subscribers by sharing their e-mail addresses

with others who don't have permission to send to your list. Don't abuse your e-mail list subscribers by sending information they didn't ask for or by using their permission as a platform for selling lots of unrelenting banner ads in the body of your e-mail newsletters.

As a general rule, don't do anything with your e-mail list data that isn't explicitly agreed to and expected by your subscribers.

You can use mobile applications to collect e-mail addresses at

- ✓ Networking events, so you don't need to take a business card and type the info in later
- ✓ Tradeshows, when you're walking the floor or working your booth
- ✓ In your store, if you have a physical location and you interact in person
- ✓ In your office, during an appointment

## Building and Sending a Mobile E-Mail Campaign

Mobile device adoption has opened up a whole new world of opportunities and challenges for e-mail marketing. The main challenges are

- ✓ Most people access the same e-mail inbox with both mobile devices and computers. So, you shouldn't design e-mails for mobile phones without thinking about how the designs will work on computers and vice versa.
- ✓ Mobile screens are small. Your e-mail designs have to make it easy for people to view the content and click on links when viewing the e-mail on a mobile.
- ✓ Your audience needs to be able to take action on your e-mails using their mobile devices and their computers.

In this section, we show you how to adapt and enhance your e-mail designs and e-mail content for mobile readability and interaction. To discover how to design and send e-mails from scratch, we recommend you read *E-Mail Marketing For Dummies*.



## Choosing a mobile e-mail design approach

When sending e-mail marketing messages, you have three basic design choices:

- ✓ **Build separate e-mails — a mobile-friendly e-mail for mobile users and a computer-friendly e-mail for computer users.** Choose this option when some of your customers tell you they only read e-mails on a mobile devices and they never read e-mails on their computers. To group your subscribers into mobile and computer users, you can use a survey or provide a mobile preferences check box on your e-mail list sign-up form, as shown in Figure 7-8.



Keep in mind that grouping your list subscribers by mobile preference means you're setting the expectation that your e-mails will look great and function correctly on every mobile device. We don't recommend going with this option unless you know that your audience has adopted the exact same standards (for example, you're sending weekly e-mails to 1,000 sales people and every last one of them uses an iPhone with Outlook installed as the e-mail system). If you need a reminder of the challenges with this option, go back to the section called, "Dealing with devices and browsers" earlier in this chapter.

**Figure 7-8:** Asking for mobile preferences is recommended only when your audience has adopted the same standards.

Courtesy of Movitas.com

- ✓ **Build all your e-mails for use on a computer and live with the fact that most of your e-mails will have limited capabilities unless your audience is in front of a computer.** Choose this option if your customers tell you they only read e-mails in front of a computer, but they check their

e-mail on mobile phones to decide what to read later. If you choose this option, let readers know that your e-mail is best viewed in front of a computer. More on that a little later in this section.

- ✓ **Build your e-mails for the best possible use on either a computer or a mobile device.** Choose this option when you want your customers to be able to interact with your e-mails on either a computer or a mobile device and you are willing to accept the fact that your e-mails will sacrifice some features you would otherwise include in an e-mail designed specifically for one environment or the other. This option is recommended and requires adapting your regular e-mail content to ensure easy interaction in most environments. This option is also recommended because devices and programmers are beginning to adhere to standards that make adjustments to HTML e-mails to make them easier to navigate on mobile screens. That doesn't mean you won't have any challenges, but it will make your computer-friendly e-mails and mobile friendly e-mails have more in common than not. The next sections show you how to use this option.

## *Creating a mobile-friendly e-mail design*

The most critical factor in mobile e-mail design is the positioning of key content to make sure the e-mail's message is displayed prominently on a computer screen or a smaller mobile screen. Most if not all mobile devices display e-mails beginning with the upper left portion of the e-mail when the e-mail is opened, which means that the most important content should either begin or should be placed entirely in the upper left portion of your e-mail, as shown in Figure 7-9.

A good way to visualize your content positioning is to mentally divide each of your e-mail designs into quadrants and then position the most important content in your e-mail in the upper left quadrant. Although you don't have to divide your content into quadrants visually, you should emphasize important content in the upper left. Here are some examples of the types of content objectives that work well when positioned in the upper-left quadrant:

- ✓ **Display your brand:** Your audience is more likely to read your e-mail when they recognize the source of the e-mail. Make sure that your business name, logo, and other brand-identifying design elements appear somewhere in the upper left.
- ✓ **Begin your e-mail message with a main headline:** A main headline doesn't have to reside completely within the upper left, but main headlines get more attention if they begin there. Some e-mail programs automatically fit headlines into the small screen and others allow the reader to scroll sideways or zoom. Either way, keep your headlines to four words or less.



**Figure 7-9:**  
Put the most  
important  
content in  
the upper  
left of your  
e-mail.

*Courtesy of ConstantContact.com*

- ✓ **Include your e-mail's main call to action:** A call to action is a statement that asks your audience to do something specific, such as purchasing a specific item, clicking a link, or pressing a button to dial a phone number. If your e-mail contains valuable offers, make sure your main offer is contained — or at least referenced — in the upper left. If your e-mail's main intent is to get your audience to read a specific section of your e-mail that contains your main call to action along with supporting information, make sure you use the upper left to prompt your audience where to look.
- ✓ **Place the strongest visual anchors:** Visual anchors — such as images, links, icons, bullets, and graphics — can reinforce your audience's perception of your most important content. Strong visual anchors used in the upper left of the screen help minimize how long your audience spends trying to figure out what content is important enough to read. (Images draw attention, but if you include an image in your e-mail that takes up most of the upper-left quadrant, your audience might miss the text associated with that image. If you decide to use an image in the upper left, use one small enough to allow the inclusion of the first few words of a text headline.)

- ✔ **Show your audience where to look next:** If your e-mail includes important content below the screen, use navigation links and directions in the upper left to help your audience navigate the e-mail. For example, the e-mail's upper-left quadrant might contain a table of contents with navigation links. You can read more about creating a table of contents in the next section.

## *Adding navigation links to mobile e-mails*

*Navigation links* are HTML links that allow your audience to jump to different sections of content within the body of your e-mail. If your e-mails have one or more headlines or bodies of content that your audience has to scroll to for viewing, you can include navigation links in your e-mail to

- ✔ Highlight the content that your audience can't see immediately
- ✔ Allow your audience to access the information by clicking a link instead of scrolling

Navigation links are actually anchor links in HTML. *Anchor links* are HTML tags that reference a specific portion of content within an HTML document and automatically scroll the browser to the top of the referenced content when clicked. To create an anchor link, create a name for the anchor using an anchor tag and place the anchor in your e-mail code at the beginning of the content you want to link to. Then add a link in your e-mail text that points to the anchor. Using your HTML or Web site editor of choice, follow these basic steps (the specifics depend on the editor you're using):

### **Text only, please**

Some mobile phones still convert e-mails into text automatically because they aren't capable of displaying HTML. When a device converts an HTML e-mail into text, the e-mail can become garbled and confusing for the recipient. Some conversions result in displaying the entire HTML code; others show the text along with long lines of code for links, images, and other design elements.

Because sending text-only e-mails to everyone eliminates links and tracking altogether, you might want to use an EMP that allows your e-mail list subscribers to choose a preformatted, text-only version of your HTML e-mails. That way, your e-mail is converted and formatted to look good to the recipient before it's sent. Some services even allow you to create and edit text-only versions of your HTML e-mails so you can control the content of the text version completely.

**1. Use an anchor tag to place your anchor and include the `name` attribute to identify the anchor's name.**

Use the first word of the headline or section of content for the anchor name so you can remember how to name your anchor link later.

- *To set the anchor in text*, include an `<a>` anchor tag with a `name` attribute within your paragraph tags:

```
<p><a name="anchorname">headline or title</p>
```

- *To name an image as an anchor*, include the `name` attribute within the image tag:

```

```

If you're new to HTML, note that you should replace *anchorname* in the preceding examples with whatever name you'd like to use. Also, *headline or title* stands in for the text that actually appears on your site. The URL in the preceding image tag also stands in for the location and filename of the image you actually want to use.

**2. Create your anchor link by inserting the `<a>` anchor tag in your HTML e-mail text, with the `href` attribute pointing to the anchor name you specify in Step 1, and preceded by a `#` character.**

- *To create a TOC link that scrolls to your anchor tag*, use the following:

```
<a href="#anchorname">TOC link text</a>
```

- *To create a navigation link that scrolls to an anchor link on your Web site*, use the following:

```
<a href="http://www.yourwebsite.com/page.html#anchorname">navigation link text</a>
```



HTML can be tricky to master and frustrating for those of you trying to format your newsletter without an EMP. For your own sanity, brush up on your HTML skills first with *HTML 4 For Dummies, 5th Edition*, by Ed Tittel and Mary Burmeister (published by Wiley) before you attempt anchor tags or other bells and whistles in your code.

Most EMPs allow you to create navigation links in your e-mails without knowing anything about HTML, and many include navigation links in basic e-mail template designs.

Navigations links can be combined to create a table of contents for your mobile e-mail. An e-mail *table of contents* (TOC) is a special group of navigation links that lists headlines; each headline is linked to a different section of content within your e-mail. Your e-mail TOC can appear at the top of your

e-mail, as shown in Figure 7-10. Alternatively, you can place it at the bottom of your e-mail and include a Skip to Navigation link at the top so your audience can easily get to the TOC and still see some of the content at the beginning of your e-mail as shown in Figure 7-11.



**Figure 7-10:**  
You can  
place an  
e-mail TOC  
at the  
beginning of  
your e-mail.

*Courtesy of ConstantContact.com*



TOCs are necessary only when your e-mail has lots of content that your audience has to scroll to view. If you decide you need a TOC because of the amount of content in your e-mail, take a moment to think about whether you're sending too much information in a single e-mail in the first place. Cutting down on your content and increasing your frequency might be a better solution to making your e-mails easier to scan on a mobile.

If you can't cut down your content, using a TOC is a great way to summarize your content and allow your audience to find and access the content that interests them most. Here are some tips for including a TOC in your e-mails:

**Figure 7-11:**  
Use a  
Skip to  
Navigation  
link to give  
your audi-  
ence easy  
access to  
the TOC and  
beginning  
content.



*Courtesy of ConstantContact.com*

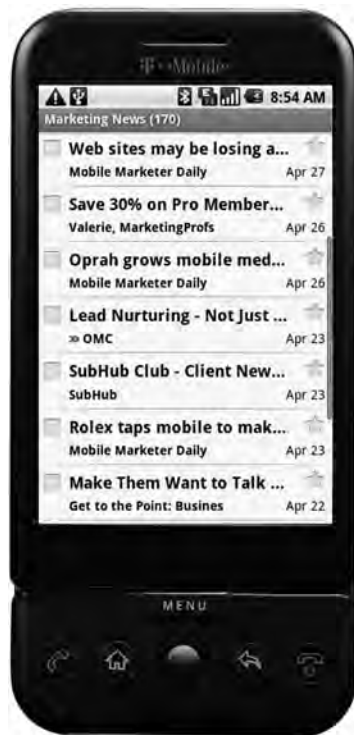
- ✔ **Include a heading above your table of contents:** Use wording, such as Quick Links or Find It Fast.
- ✔ **Keep your link headlines short:** You can use the first few words of the article headlines to which you're linking, or you can repeat short headlines as your main headlines and then use subheadings in your articles to expand on main headlines.
- ✔ **Make your link headlines clear:** Links should clearly communicate the content readers will see when they click. Clever links intended to generate curiosity are generally harder to understand than clear link headlines — they might cause disappointment if the linked message doesn't meet the clicker's expectations.
- ✔ **Keep your TOC above the scroll line:** The *scroll line* is the point at the bottom of your audience's mobile screen where the e-mail content is no longer visible without scrolling. The whole point of a TOC is to keep people from scrolling. If your TOC is so long that it stretches beyond the scroll line, your e-mail probably has too much content.

## *Writing mobile e-mail content*

Creating effective mobile e-mail content begins with placing familiar and motivating information into every e-mail header. The *header* is the portion of your e-mail that contains the following:

- ✓ A From line
- ✓ A From address
- ✓ A Subject line
- ✓ Messages and code inserted by e-mail programs

Mobile e-mail programs display portions of your e-mail's header information so users can sort and prioritize their e-mails and decide whether to view and open each e-mail. Figure 7-12 shows how Gmail displays headers on an Android device.



**Figure 7-12:**  
The e-mail header helps readers to decide whether to open the e-mail now or later.



When used appropriately, your header information helps your audience to identify you as a trustworthy sender and also helps to determine whether your e-mails are worthy of immediate attention.

Although you can't control all the information in your e-mail headers, you can control three important pieces of information that are most useful to your audience:

- ✓ **From line:** Your *From line* is a line of text that tells the recipient of your e-mail whom the e-mail is from. Most e-mail applications and e-mail marketing providers allow you to add a line of text to the header of your e-mail to identify yourself. Ask yourself how your audience is most likely to recognize you and then craft your From line to include that information.
- ✓ **From address:** Your *From address* is the e-mail address that is associated with you as the sender of the e-mail. Some e-mail programs display your From e-mail address along with your From line, but others display one or the other. Make sure your e-mail address has your company name in it as in `john@yourcompany.com` or `yourcompany@gmail.com`, for example.
- ✓ **Your subject line:** The most effective Subject lines are those that prompt your audience to open your e-mails to look for specific information. Keep your subject line between five and eight words so most or all of it displays on a mobile screen.

After you've determined what your header information should be, you need to write your e-mail content. All e-mails should be concise, and any e-mail that has the potential to be viewed on a mobile device should be as short as possible while still getting your point across.

One way to ensure that your e-mail is going to be well received on a computer and a mobile device is to include a prologue at the beginning of your e-mail. A *prologue* is one or two sentences summarizing the content of your e-mail so that mobile recipients can decide what to do with your e-mail, as shown in Figure 7-13.



**Figure 7-13:**

Use a prologue to tell your audience what to do with your e-mail.

*Courtesy of ConstantContact.com*

Your prologue should contain one or more of the following bits of information:

- ✓ **A link to a mobile-enhanced Web version of your e-mail content so mobile phone users can see the e-mail:** Point the link to a mobile Web site that can detect the phone and browser and display the e-mail content properly. You can read more about building mobile Web sites in Chapter 8.
- ✓ **The main purpose of your e-mail:** People often use their mobile phones to sort and prioritize e-mails before reading them. Use your prologue to sell the value of your e-mail content so people want to read it immediately.
- ✓ **What to do with the e-mail:** If the recipients can take action immediately, state that in the e-mail prologue. If they need to be in front of a computer, tell them to save the e-mail for later.