

# Automated Conversations

The primary objective of automated conversations is to provide a quick and accurate response to incoming messages whenever possible. However, automation is also extensively used for campaigns as well, especially for drip or nurture campaigns.

## **Auto Response**

Auto-response can be used for various situations and various objects. In case of a Contact, you can set up for sending the next set of information when the recipient responds with a specific keyword.

For a Case, if you don't get a response from the recipient in stipulated time then you can send out a reminder.

Here is the general process flow to set up auto-response:



## **Automated Campaign Setup**

Automation can be used for setting up different campaigns as well. Here is a sample for setting a drip campaign using Marketo.

Prerequisite – SMS-Magic Converse is integrated with Marketo and Leads from Marketo are synchronized in Salesforce.

Automation can be used for setting up different campaigns as well as follows:



Check the links for more details on different scenarios and use cases.

To Set Up ...	Use ...	Details
Nurture or Drip Campaign	Converse Ap with Flows	<a href="#">Setup Nurture or Drip Campaigns</a>
Auto Response on Keyword	Workflow	<a href="#">Setup Keyword-Based Auto Responses</a>
Alerts and Reminders –	Converse App Automation	<a href="#">Event-Based Alerts and Reminders</a>
Multi-touch Campaigns	Converse App with Workflow	<a href="#">Multi-Touch Campaigns</a>
Marketo Campaign	Converse App with Marketo	<a href="#">Multi-Touch Campaigns</a>
Pardot Campaign	Converse App with Pardot	<a href="#">Multi-Touch Campaigns</a>
Salesforce Marketing Cloud	Converse App with Salesforce MC	<a href="#">Multi-Touch Campaigns</a>
Run a Survey	Converse App	<a href="#">Run a Survey</a>

## Event-Triggered Alerts & Reminders

SMS-Magic Converse provides Converse App functionality. This can be used very effectively for bulk messaging and automated conversations.

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## Setup Nurture or Drip Campaigns

Nurture or drip campaigns are used for a variety of reasons.

- To educate or nurture your prospects and customers
- Learn more about them through a series of questions and content
- Simplify a complex process by automating it through messaging



Nurture or drip campaigns are typically used in the following scenarios:

- Nurturing new leads – While recruiting students, Universities can send them multiple messages to educate them about the prospects and opportunities their institute offers.
- Deepen your relationships with relevance – Survey your audience to find out what they want to know, then share the exact information through a series of messages.
- Run Loyalty programs – You can deliver timely and powerful loyalty program updates that keep your customers coming back for more.
- Automate a complex or detailed process – You can monitor and manage the workflow of sales contractual processes, simplifying them for both clients and brokers.

For more information about creating a drip campaign, see [Create a Drip Campaign](#).

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## Setup Keyword-Based Auto Responses

Keyword-based automation is the automatic sending or triggering of text messages to individuals or groups of people based on certain keywords. You can configure keyword-based automation when messages are triggered on a specific date and for a particular event. This is similar to running drip campaigns. Keyword-based automation saves time while ensuring that your customers instantly get the right response and your lists are accurately updated based on the keywords in your received messages. As a business user, you can define the automation template in the Converse App which can be used

to make it work with workflows.

For more information about keyword-based automation, see [Keyword-Based Automation](#).

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## Event-Based Alerts and Reminders

Text messages can be used for a variety of business use cases around scheduling. Anytime you need to schedule an event, appointment, series of meetings or personal appointments, conversational messaging is your answer.

Scheduling is great for scenarios like:

- Meetings – Set up meetings with your prospects and confirm it. You can send recurring reminders as follow up messages.
- Interviews – You can schedule interviews for jobs, education, enrollment, and more using the Converse Scheduling App.
- Webinars and online events – Promote events, enroll your attendees, confirm their enrollment, and remind them of the upcoming event through an automated conversation flow.
- Live events – Promote your live events with customers, prospects, students, and more through messaging.

For more information about event-based notifications, see [Notification to Users](#).

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## Multi-Touch Campaigns

### **Marketo Campaign**

The Marketo platform can be synced with SMS-Magic Converse. This enables the users to access Lead records from the Marketo Lead database and send automated messages. Once integrated, you can also search for new or existing leads on the Marketo Platform. For more information, see [Automate SMS Messaging in Marketo](#).

### **Pardot Campaign**

Pardot integration simplifies the process of receiving automated messages when a customer interacts with your business. You can create a Converse App task and configure it within a Pardot form to receive automated messages against any customer interaction. You can also leverage the SMS on Workflow

to send an automated message against a lead generation action. For more information, see [Automate SMS Messaging in Pardot](#).

## **Salesforce Marketing Cloud**

You can send automated messages through Salesforce Marketing Cloud using Converse App tasks. You can associate templates for sending messages from the Marketing Cloud. Converse App tasks are configured within the Salesforce Marketing Cloud (SFMC) Journey Builder. For more information, see [Configure Converse App Task in Marketing Cloud](#).

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## **Run a Survey**

There are two ways to run SMS Surveys using SMS-Magic Converse:

- You can leverage the functional capability of Converse Apps to design the complete survey. The Converse App helps you create automation templates and define message flows. Once done, you can integrate those with flows to create message triggers and run the survey campaigns. You can define templates and message responses based on your business requirements.
- You can also create a simple message campaign with two message flows. Send a survey participation request upon receiving the expected response, attach the survey link in the message response template.



For more information about creating a survey, see [Run a Survey](#).