

Use Cases for Conversational Messaging in Sales

LEARN HOW TO ATTRACT, ENGAGE & RETAIN
MORE PROSPECTS AND CUSTOMERS

Now more than ever, successful selling is dependent on creating and building trusted relationships with your prospects and customers.

The challenge? How to get your prospects to have a conversation with you.

In a world where voicemails and emails go unanswered, how do you get your prospects to engage with you before they make their buying decisions? How do you have consistent, relevant conversations with your buyer, moving them through the buying cycle at their own best pace?

Messaging gives your sales team a proven method of increasing both their number of conversations and the relevance of those conversations. Specifically, your sales team will:

- **Converse with more prospects.** Sales agents will have conversations in a way that is preferred by your prospect or customer, which means they'll have significantly more purposeful conversations.
- **Relevant, continuous conversations.** With alerts to incoming messages, your teams can respond to prospects or customers in near real-time. Your teams can also continue that conversation whenever prospects respond, or by reaching out to them for timely touches with relevant information. Reps can choose whether they personally send a response or automate responses based on specific customer preferences and interests.
- **Know why you convert.** Reviewing conversations that convert lets you understand why different prospect profiles convert. These analytics guide you to optimize sales messaging to increase conversions with all prospects.

These are a few of the benefits you'll get from conversational messaging in sales. As you continue to review this course, we'll expand on these benefits and discuss more opportunities.

Messaging Applications for Sales

In the following segments you'll find an introduction to some of the ways you can use conversational messaging in sales.

1. Increase Your Sales Team's Responsiveness

Research shows that 35-50% of sales go to the vendor that responds first. Messaging will help your sales team be the first to respond and to continue to respond in a timely fashion.

- **Immediately know when you have a new prospect.** Conversational messaging can trigger a message or alert the minute your prospect takes action to engage with your business. This way you can respond immediately.
- **Automate the first response.** Conversational messaging solutions can automatically send an immediate message to that new prospect, introducing you as their sales agent and offering any other information you might want to send to them.
- **Learn more about your prospect.** As part of your first conversation, you can ask your prospect what they're most interested in with a text message. Make it easy for them to respond with a simple keyword to tell you what's most relevant to them.
- **Immediately respond with relevance.** When your prospect responds, automated workflows can send them relevant information based on their keyword. You can begin to educate and nurture them as a prospect quickly. Or a sales agent can respond personally to their specific area of interest.

2. 360-Degree Prospect View

One of the hardest jobs for a sales team is to learn as much as they can about their prospect, as quickly as they can. Traditionally, the handoff of leads from marketing to sales has provided high-level insights about a prospect. With messaging, you can capture a depth of information by simply reviewing the conversations.

- **Never lose track of the conversation.** Advanced conversational messaging solutions store every conversational message within a database or your CRM. Any user with permission to access these records can review every interaction and piece of information that's been sent from marketing, another sales team member or anyone else in the organization, as well as the prospect's responses.
- **Aggregate conversations across company contacts.** You can also aggregate all conversations from a company. For example, a prospect from AMC Company in one location might be requesting pricing for the same products as another prospect from AMC Company in a different location. You'll

see these common requests and be able to recommend they combine their quotes and orders to get a volume discount.

- **Keep everyone in sync.** You can also use conversational histories to share prospect background with your sales team members so that everyone involved with a prospect or account is up-to-date with the latest prospect or client conversations. When the regular agent for a prospect or customer is out of the office or unavailable, another team member can easily pick up the conversation and move forward.

3. Prioritizing Hot Prospects

Advanced conversational messaging solutions give you the ability to prioritize prospects or accounts based on their status, behaviors or by creating a list of specific high-priority conversations.

- **Real-time alerts.** You can direct your solution to alert you as soon as a prospect responds so you can send a personal reply. Or you can trigger an automated message designed specifically for your prioritized prospects.
- **Behavioral targeting.** Suppose you already know a few behaviors or actions that tell you a prospect is really interested, based on your past experience with your sales cycle. Simply tell your conversational messaging solution to alert you when one of those behaviors or actions occurs. You can respond personally or begin sending your hot prospect automated messaging conversations based on the content you know drives successful conversions following the "buying" behavior.

4. Continuing Conversations with Stalled Prospects

Prospects stall in the sales cycle. It's a fact in sales. You can send them emails or leave them voice-mails but usually they don't respond. Messaging gives you a communication channel that is widely read and drives more responses. So you can continue the conversation with your stalled prospects and a significant percentage of them will listen and respond.

- **Automatic messaging workflows.** Sales can set automated workflow conversations to reach out to their prospects on a regular basis. Send them new information, ask questions or give them new ideas to think about. It's all automatic, so reps don't spend time checking on ticklers and contacting each prospect individually.

- **Re-engaging dormant leads.** Even if they've been quiet for a while, when a prospect resumes activity or responds to you, you'll immediately know thanks to alerts. Then you can decide whether to reach out to them personally or begin a different conversational workflow about their specific action and area of interest.

5. Simplifying Complex Processes

Some types of sales require more complicated contractual agreements that are dependent on progressive signatures. For example, real estate and mortgage contracts. Advanced conversational messaging lets you flexibly automate the delivery and verification of these document workflows.

Using messaging for a document workflow:

- **Define the process** that you'd normally use to follow-up to confirm a contract, or any other paperwork you might need as part of your sale.
- **Automate that process** in a series of conversational messages. When your buyer responds with information (aka a signed document or approval keyword), the next step of the process will trigger. If they ask a question, you'll be notified and can get personally involved.

Since every piece of paperwork or necessary step is included in the workflow, you won't have to worry about dropping a ball or forgetting a form. If a buyer hasn't responded in a certain amount of time, you can message them a reminder as part of each step of the automation.

6. Improving Relevance

Speaking to a prospect about something that's relevant to them is the best way to move a sales prospect forward. When you can't get a prospect to engage, it's difficult to know what to share to build engagement. Messaging helps sales agents learn more about their prospects.

- You can send a personal message that asks which area is of most interest to them. When they reply with a keyword, you'll know what interests them most.
- That keyword response can trigger an automatic conversational flow designed to share key insights and information about their topic of interest. Or a rep can choose to respond personally.

- If a prospect wants to know more and asks a new question, you'll be alerted to their message. You can then decide to respond personally or trigger a messaging campaign to send them more information on their new area of interest.
- Advanced conversational messaging analytics give you insights into which pieces of content move your prospects to action. Let's say you're sending a multiple message conversation about a specific topic. You can use analytics to tell you which piece of content or message triggered the most buying actions/behaviors. You can also detect if there's a piece of content that seems to push prospects away from moving forward.

Summary

Conversational messaging offers a variety of benefits to sales agents and management. The above examples offer an overview to how you can use messaging within your sales teams.

Read **Driving Value with Conversational Messaging for Sales** in this course for deeper insights.

About SMS-Magic

SMS-Magic is a proven, global messaging platform for Salesforce, with over 1500 clients across 190 countries, including small, midsize, and enterprise accounts. SMS-Magic enables Salesforce users to engage buyers and win and retain more new customer revenue, while creating strong customer relationships that drive sustainable competitive advantage. SMS-Magic is the most positively reviewed messaging application on Salesforce AppExchange.



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