



The Modern Customer Journey


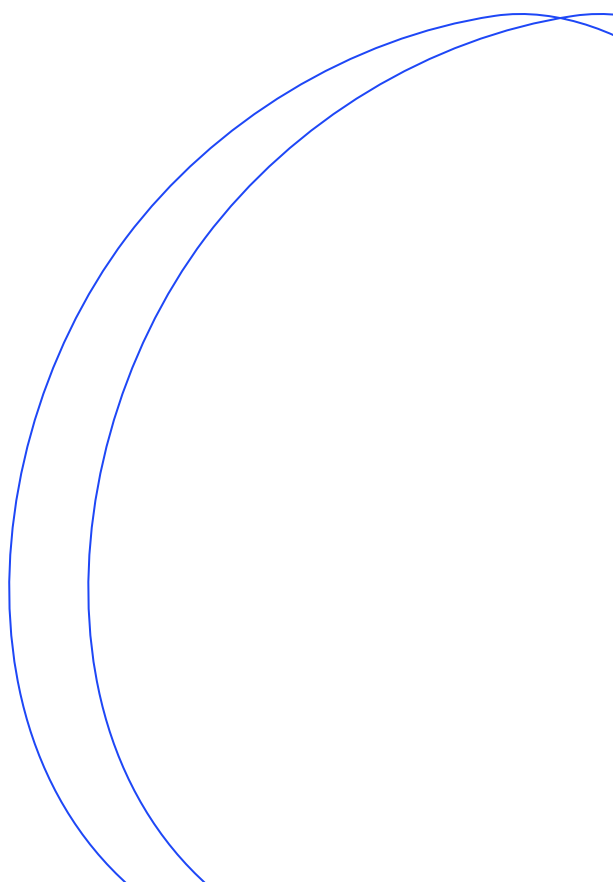
 10 Surprising Ways You Can Use Text Messaging

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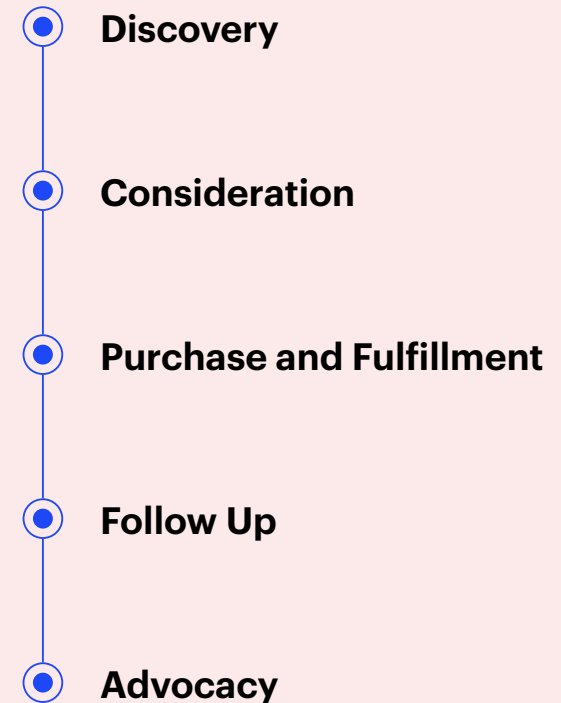


Introduction

The customer journey is paved with critical touchpoints. From discovery to purchase decision to referral, the opportunities to connect, convert, and create a relationship with your customers are frequent and incredibly important. And customers know it too.

More than 50% of consumers believe companies need to fundamentally transform how they engage with customers.¹ Most brands believe the traditional methods of email, phone calls, and in-person visits are sufficient for those critical touchpoints. But today's modern customer needs and wants more. 90% prefer to interact with a brand via text message.² And it's no surprise. Open rates for text messages are reported at 98% while email still sits at 20%.³ The reason? We expect text messages to be personal—and personalized communication is what your customers expect from brands today.

Ready to add personalization to your customer experience? Here are 10 surprising ways to add text messaging at every stage of the customer journey:



Discovery

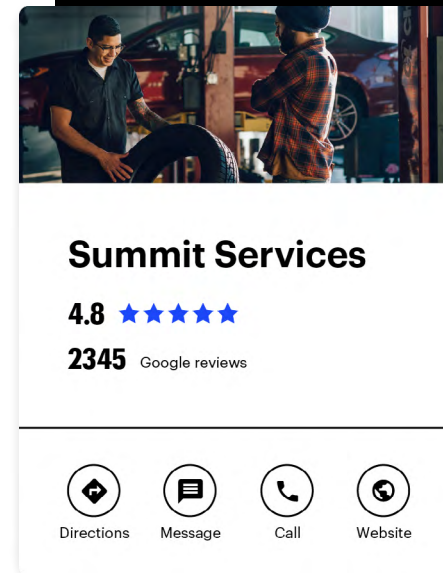
The prospect journey in the 21st century starts online. And likely on a mobile device (studies prove that over 90% of consumers use a mobile device to research a product purchase and then go on to make the purchase).⁴ The pressure to show up in the top three to five search results mounts every year. Currently, businesses that show up at the top have a 75% chance that a consumer will click into their site.⁵

And while 80% of consumers say convenience is a top element in a positive customer experience,⁶ many businesses don't heed the call. Here's how you can create a convenient experience and add texting to the discover phase of the modern customer journey:



01 Allow prospects to text you directly from search.

Convert your landline or add a textable number to your Google My Business listing. Nearly 90% of all consumers who search for a local business on a mobile device—and 58% of all site visits are on a mobile device⁷—will reach out to that business within 24 hours.⁸ Make it easier for prospects to reach you (and for you to connect with them) by adding a textable number to their search results.

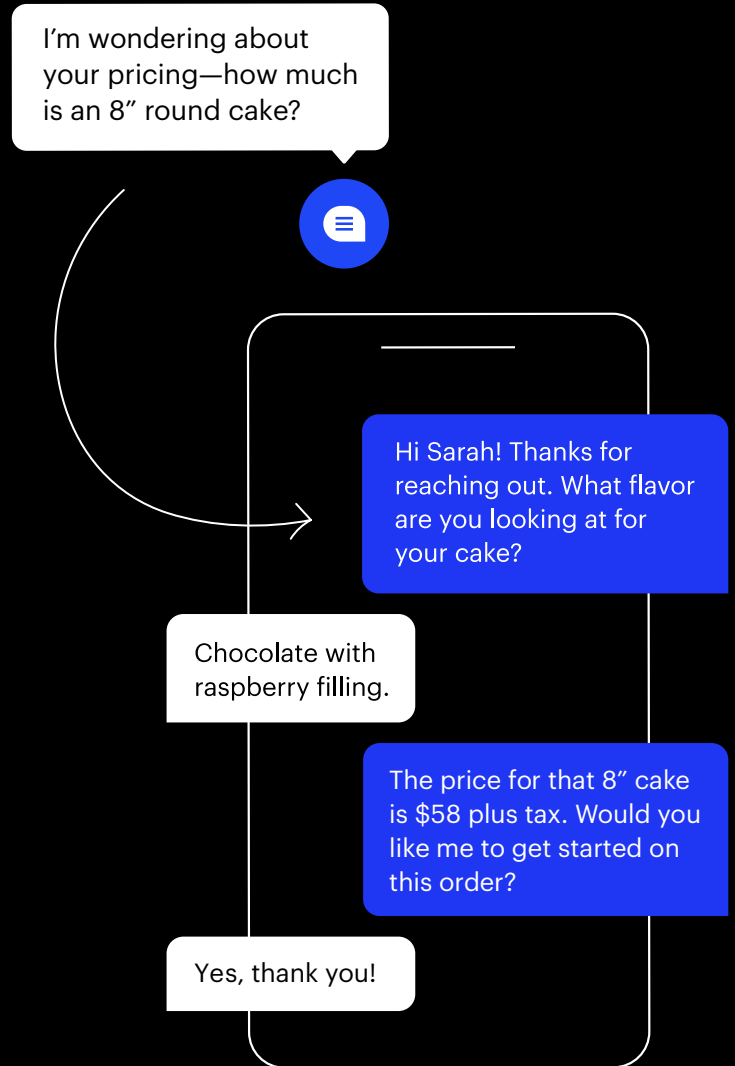


I'm looking to get my oil changed today. Do you have any openings?

Hi! Yes we do. We have 2:00 and 5:00 available right now. Do either of those work for you?

02 Convert web chats into text conversations.

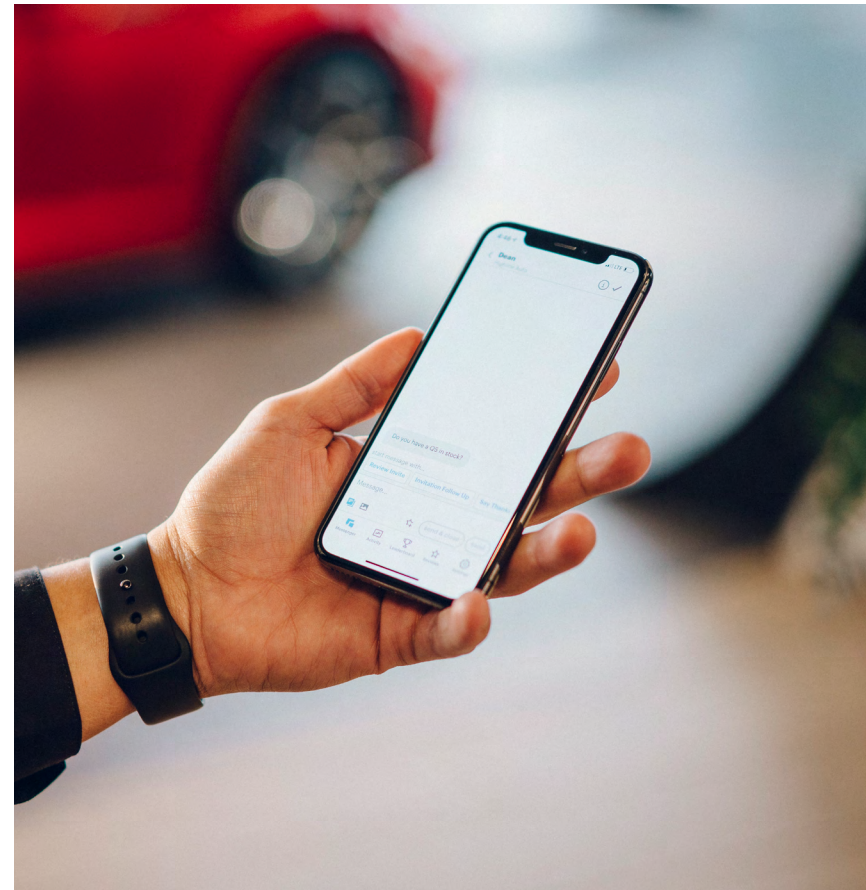
50% of all mobile website visitors expect your website to offer a live web chat option.⁹ But when the conversation is cut short when the prospect needs to step away from their computer, the convenience of a web chat falls flat. Convert your web conversation to a text thread. It's a better way to communicate and a great way to follow up with more details for prospects on the go.



Consideration

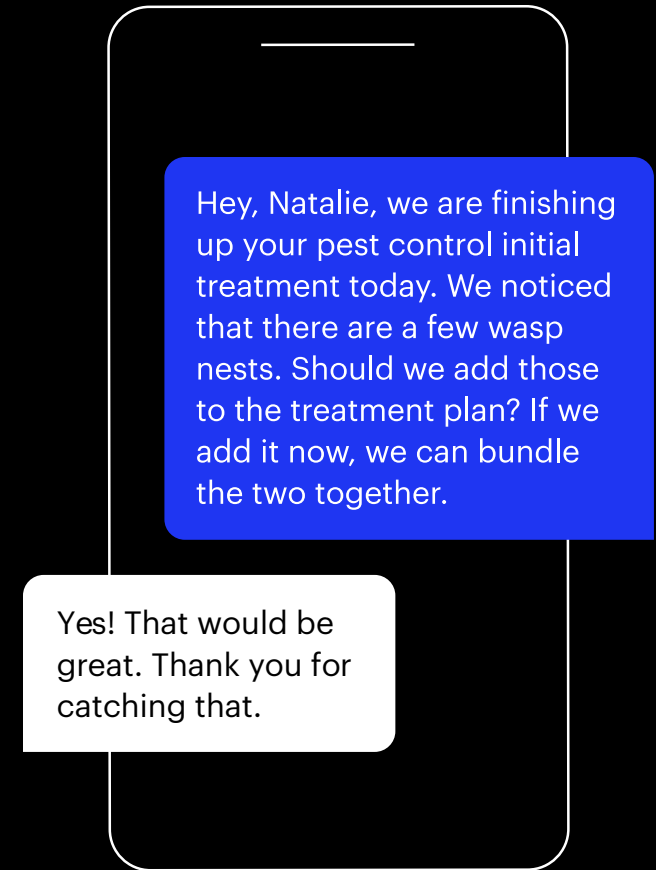
Once the prospect has moved through the discovery phase, they're ready to consider your business as an option. And this step is critical. 84% of customers say the experience a company provides is as important as its products or services,¹⁰ so it's not just about differentiating your offering anymore. Adding convenience, ease, and an experience that delights your customer is imperative to winning their business.

And texting can do just that. In fact, 50% of consumers in the United States that receive a branded text will go on to make a direct purchase from that brand.¹¹ Here's how you can maximize your prospects' consideration phase with texting:



03 Pitch personalized product offers.

75% of consumers actively want to receive offers and upsells relevant to them, directly on their mobile device.¹² If you can customize it further with their name and context about their history with your business, you've got an incredibly surprising way to delight your prospect. Whether you're referencing a sales conversation or a past purchase, make the offering relevant, personalized, and specific to the prospect's or customer's immediate needs.



Purchase

97% of consumers have backed out of a purchase that was too inconvenient.¹³ If your payment process is hard to understand or doesn't include new expectations, like contactless payments, you're likely creating friction in the buying process (and losing sales). Distractions and other barriers make this stage of the customer journey essential to your business, no matter your industry. And when the prospect starts their journey via local search, there's a 78% chance that their visit will result in an offline purchase—usually within hours.¹⁴

By adding the convenience of text messaging to the purchase and fulfillment stage, you will streamline communication, increase your chances of closing the deal, and seamlessly transition to the fulfillment of your product or service.



04 Close the deal (and collect payment).

Consumers are loud and clear today—texting makes working with or buying from a business more convenient.¹⁵ And nearly 1/3 prefer a mobile payment option,¹⁶ yet only 26% of businesses use text messages to collect payments.¹⁷ Meet your customers where they want (with minimal barriers and incredible convenience)—their text message inbox. Stay ahead of the curve and keep up with the modern customer’s expectations.

Hi, this is Josh. Can I help you with any last minute gifts for the holiday? I have this matching necklace and earring set for \$2,500.

Oh that would be perfect! I will take them. How do I pay?

I will send you a payment link and I'll overnight the package for Friday delivery.

Great! Thank you.

 Payment Request of \$2500.00

 Garret paid \$2500.00

Invoice number: 2017046-8403-01

[View details](#)

Fulfillment

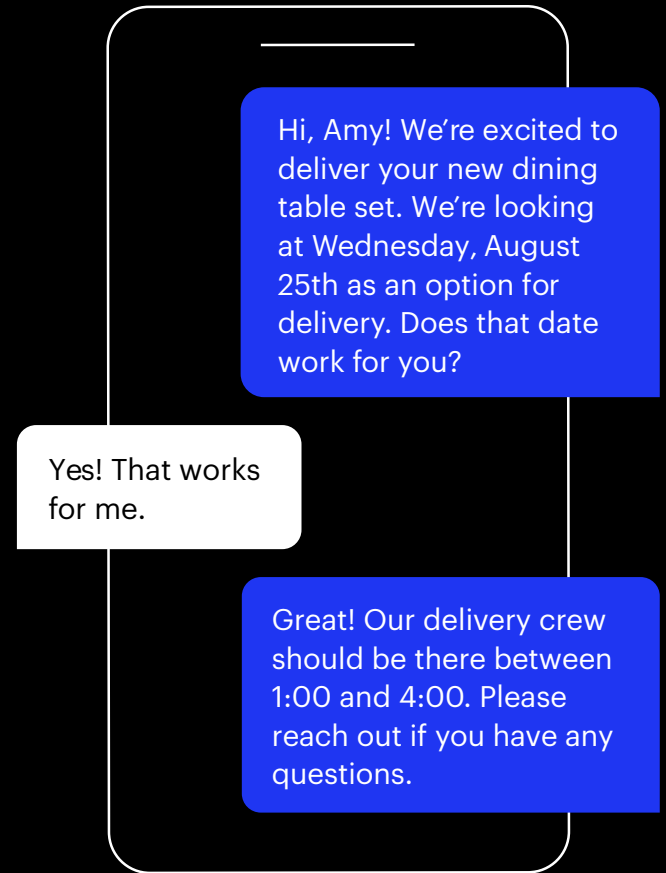
While texting offers a great way to connect, convert, and collect payments from prospects and customers, it offers an even better way to deliver a convenient customer experience in the fulfillment stage of the buying journey. And if your business offers multiple locations, automating this process can save your team valuable time.

And customers will respond faster too. 98% of all text messages sent are opened by the receiver.¹⁸ Here are a few ways you can add texting to the fulfillment stage of the customer journey:



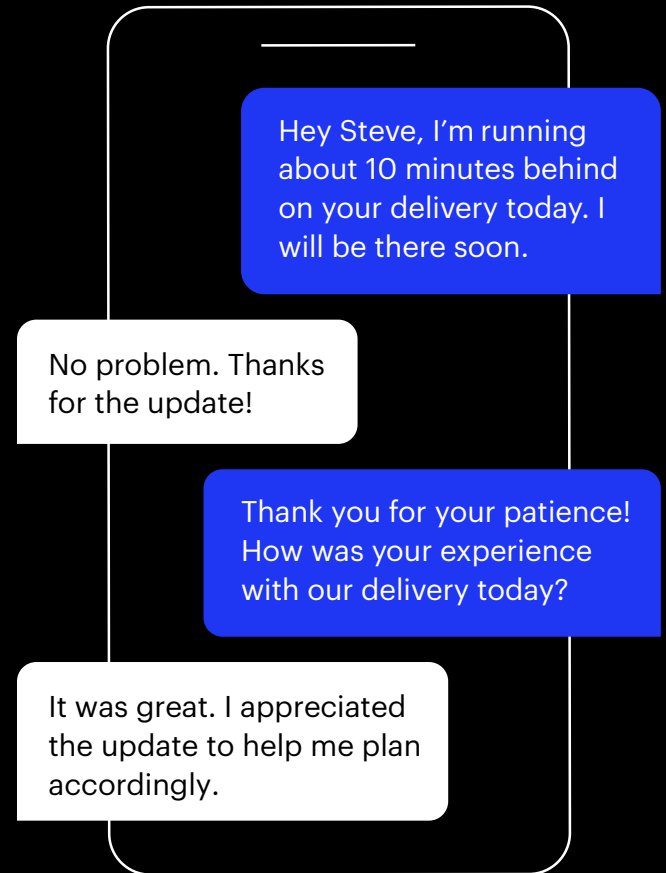
05 Set appointments via text.

Use text messaging to create a personalized approach to appointment setting. It's as simple as it is over the phone, but it's even more convenient for the customer. Especially since consumers spend nearly 4 hours a day on their mobile devices (more time than they consume TV).¹⁹ With texting as an option for appointment setting, you can offer multiple options and confirm the time slot in real time. No need to send an email in hopes of a confirmation.



06 Confirm delivery in real time.

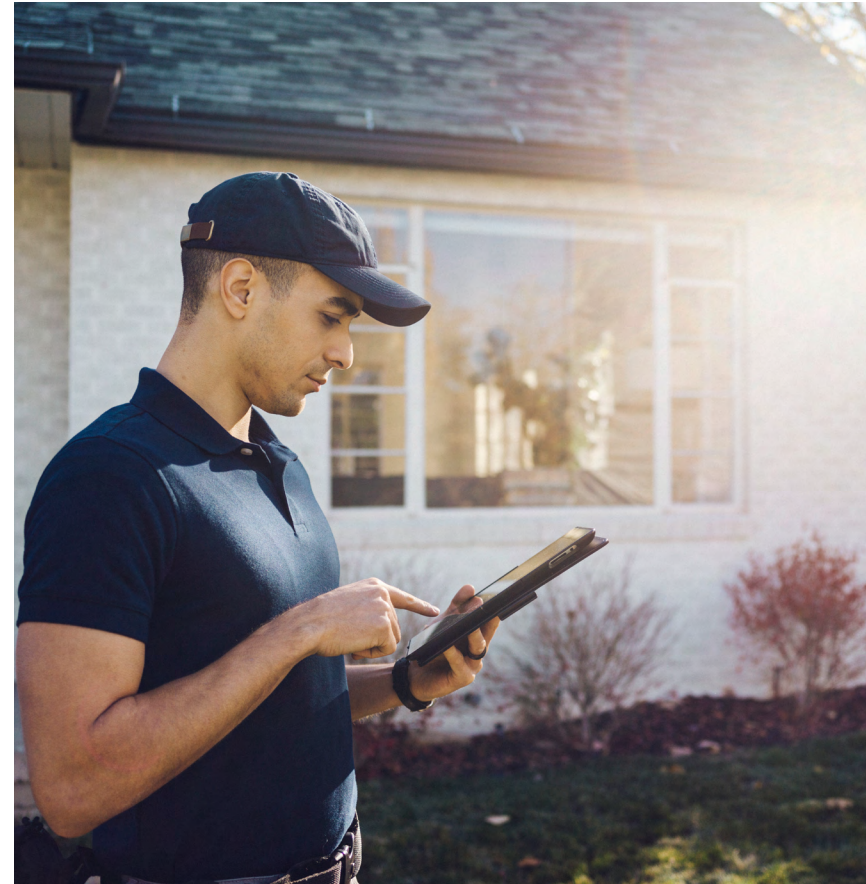
Your product delivery will be delivered by a real human, so let a real human interact via text. Use text messaging to give your customer a human view of when their item will be delivered. Yes, watching a bubble move across a screen in real time can be entertaining, but getting a text from the delivery driver (instead of an update from a computer) offers a personal touch that can set your business apart from the competition.



Follow Up

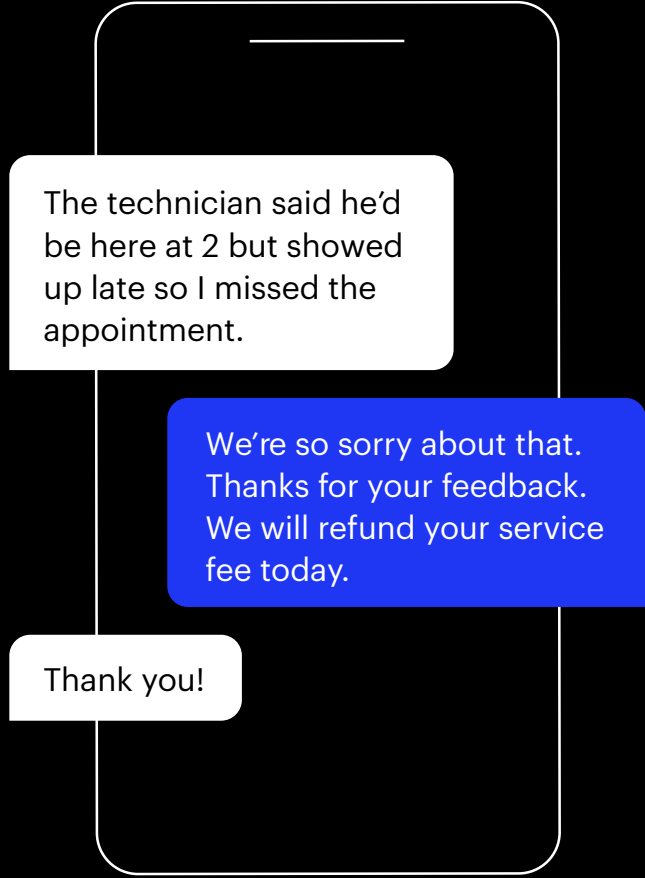
The follow-up stage of the customer journey consists of two important conversations—collecting feedback in real time (instead of later in an angry online review) and offering personalized promotions for return visits. Your current follow up strategy likely includes a mix of phone conversations, emails, maybe even direct mail, but if it doesn't account for the amount of time consumers spend on their mobile device, you're missing out on critical touchpoints.

Here are two ways you can add texting to your follow up strategy with customers:



07 Gather feedback.

If you're asking for feedback in a bulk email or a bulk text, you're not going to get responses in bulk. Your customers don't want to offer feedback to you (valuable feedback) in a way that feels like it won't be read or even used by a real person. Instead, offer messaging throughout your customers' journey and make sure they're communicating with an actual human. It gives you the power to ask for feedback and to actually respond to that feedback in real time. Customers will be more likely to tell you what's not going well, what's working, and if anything needs to change, because they'll be used to talking with you via text.



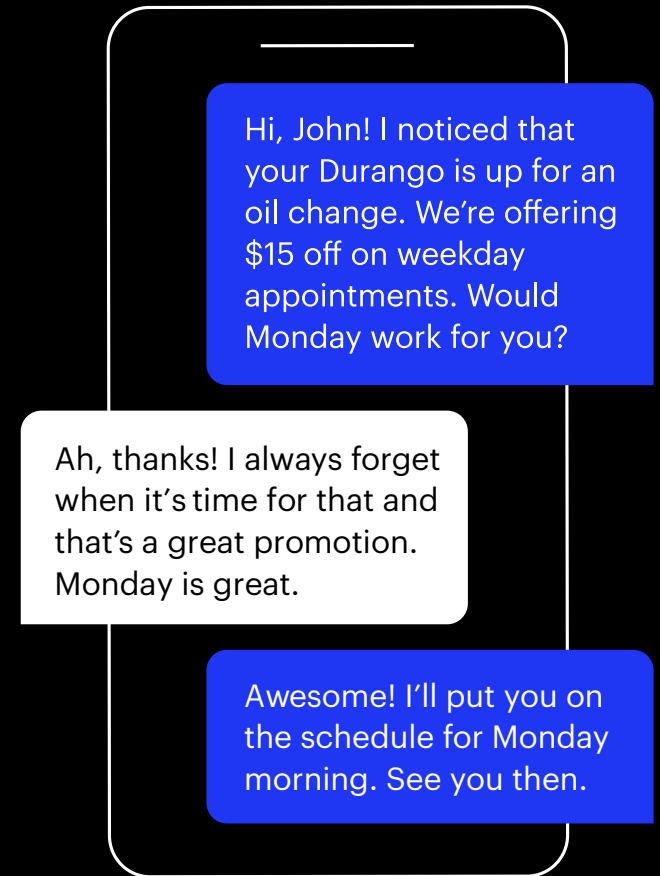
The technician said he'd be here at 2 but showed up late so I missed the appointment.

We're so sorry about that. Thanks for your feedback. We will refund your service fee today.

Thank you!

08 Offer personalized promotions for return visits.

Earn repeat business with personalized promotions that promote return visits. Customizing an automated reminder that it's time to get your oil changed or schedule your pest control humanizes the offer and connects with the customer—especially if it's delivered right to their phone.



Advocacy

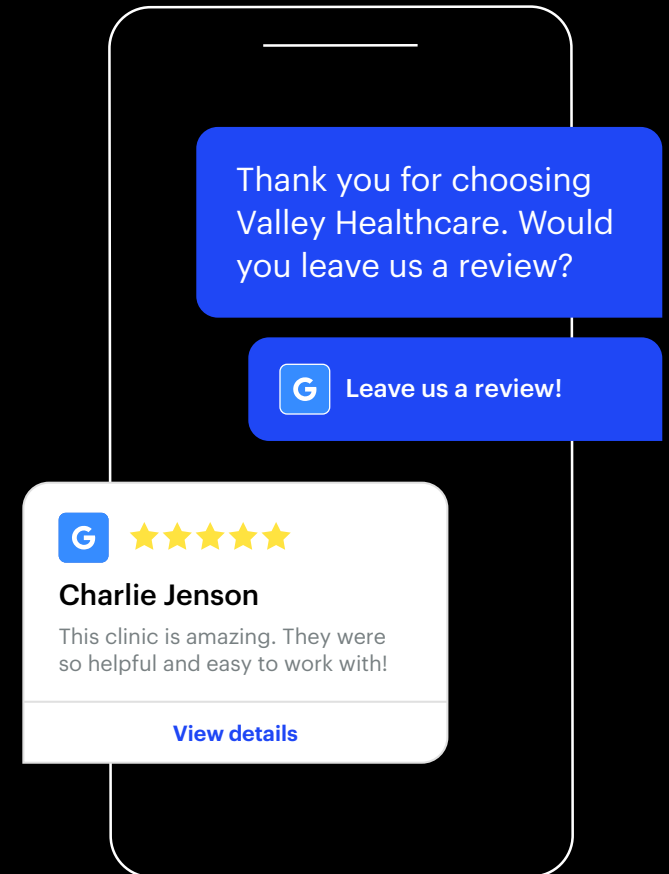
The customer journey circle isn't complete without advocacy. Your business needs happy customers to review your business so new prospects can find you and do business with you. But with email open rates low and referral programs often forgotten, your business may be struggling with this stage of the buyer's experience. Turn it around and transition your messaging to the customer's most-likely screen—their phone.

Here are two ways you can add texting to your advocacy plan:



09 Generate more reviews.

Reviews are critical for future prospects. Nearly 88% of consumers read reviews to better understand if they want to work with them (or buy from them).²⁰ Don't make your ask for a review static, likely to be lost in an inbox, or pushed aside as unimportant. Make it personal by texting your customer, directly. The good news? 45% of consumers will complete the desired action in a text they receive.²¹ Your reviews should increase with a transition to text messaging.



10 Ask for referrals.

Just like asking for feedback or for reviews, asking for referrals should be done with one-to-one communication. It's a great opportunity to thank your customer for their business, ask for a referral, and offer them something in return. Instead of detailing your program in an invoice or follow-up email (which only has an open rate of 20%²²), transition your ask to a text message.

Hi, Abby! I enjoyed working with you and I'm so happy to hear the carpet looks beautiful! I wanted to let you know about our referral program. I know you are saving up to carpet the rest of the basement!

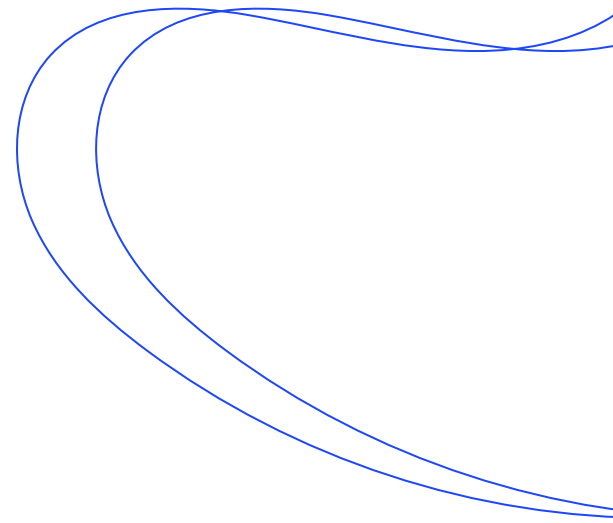
Great! I'd love to hear about the program.

Awesome! For every client you refer that purchases at least one room of carpet, we offer 5% off your next room purchase. It's a great way to save money on the next project at your house.

Oh I definitely recommend you to everyone I know—I'll let them know they should use my name!

More ways to use texting for your business.

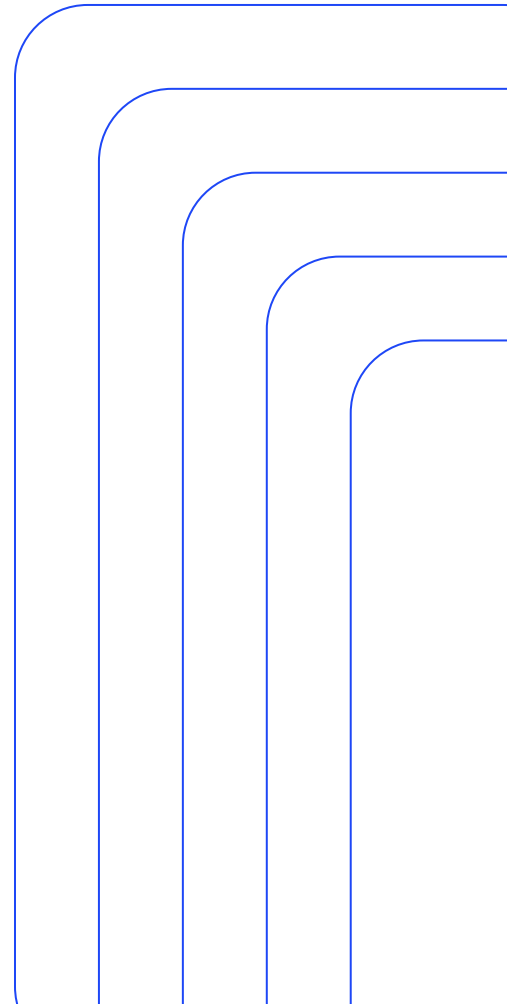
- **Send follow up instructions or information**—offer links to your website with instructions that help with your customer’s new purchase.
- **Deliver order confirmations**—let them know you received their order and you’re prepping it now (and open up a line of communication in case anything needs to change).
- **Invite prospects and customers to events**—send personalized invites with a higher chance of an RSVP.



Industry Guides

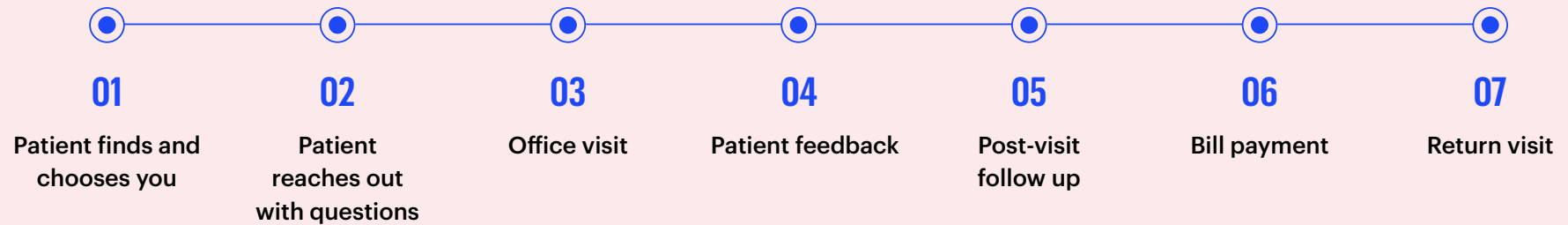
Craft the right experience for your industry.

Each industry is unique and with it, customer interactions and the overarching journey require targeted, industry-specific messages. The following four guides break down surprising ways you can add text messaging to the modern customer journey in healthcare, retail, financial services, and home services.



Surprising ways you can use text messaging in healthcare.

Only 17% of patients currently engage with their providers via text.²³ Implement texting into your communication plans with patients and you'll find it's convenient, responsive, and what your patients want and expect in their modern customer journey:



01 Patient finds and chooses you.

Show up in search results.

- ✚ Collect reviews from current patients on the sites that matter most—Google, Healthgrades, Doctor.com, etc.—to ensure new patients have a better chance of seeing your clinic, hospital, or instacare in their online search.

02 Patient reaches out with questions.

Add a textable number to your Google My Business listing.

- ✚ Mobile searches are increasing and it's more convenient, especially for a medical appointment, to click to call and click to text, directly from a search on the patient's phone.

03 Patient visits the office.

Improve waiting room safety.

- ✚ Keep your waiting room empty and safe. Ask your patients to wait in their cars or outside. Text them when you're ready and they can enter the building.

04 Patient delivers feedback.

Offer a direct line of communication.

- ✚ 96% of all healthcare complaints are related to customer service.²⁴ Offer a direct line to provide feedback and you'll capture complaints before they surface in an online review.

05 Patient needs post-visit follow up communication.

Deliver critical care and visit information.

- + Nearly 70% of patients report that they want more communication from their providers after they leave the office and before they return for the next visit.²⁵ Meet the need and deliver the critical care information discussed in the appointment or advice for preventative healthcare and you'll create a better, more modern and helpful, experience.

06 Patient pays his/her bill.

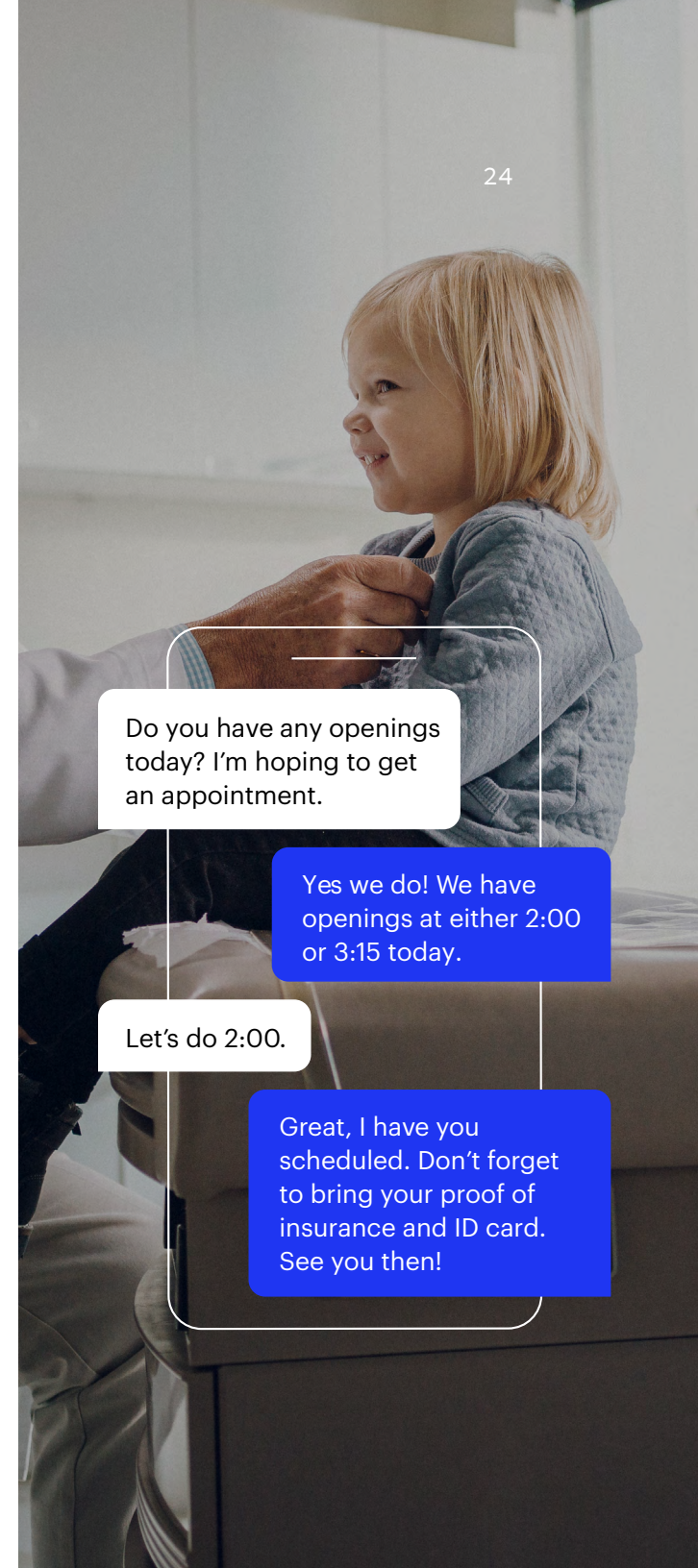
Offer mobile payment and get paid faster.

- + It can take at least four weeks to collect payment from typical patients.²⁶ Instead of mailing a billing statement and waiting for it to be delivered, reviewed by your patient, possibly confirmed by insurance again, and finally paid, offer a more convenient, modern way to make a payment.

07 Patient visits the office again.

Schedule appointments and automate reminders.

- + Through texting, you can reduce your staff's time on the phone by scheduling appointments and even automating follow-up visits. Instead of phoning or mailing reminders, automate the messages via text.



Do you have any openings today? I'm hoping to get an appointment.

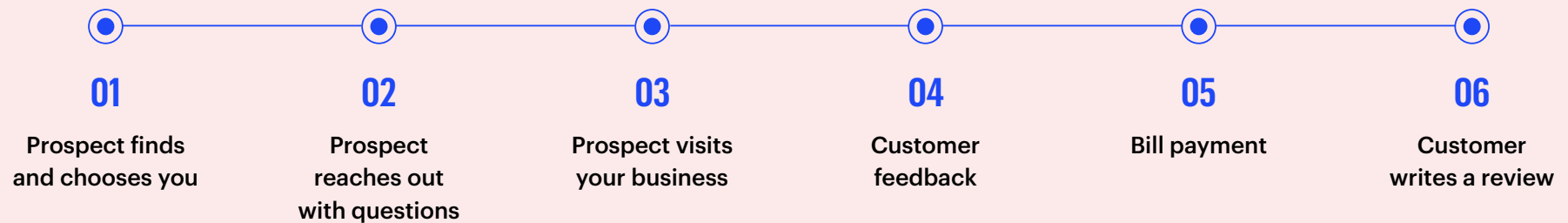
Yes we do! We have openings at either 2:00 or 3:15 today.

Let's do 2:00.

Great, I have you scheduled. Don't forget to bring your proof of insurance and ID card. See you then!

Surprising ways you can use text messaging in retail.

Retail shoppers are already on their phones—nearly 80% use their mobile phones to search for products in their purchase cycle.²⁷ Implement texting into your communication plans with prospects and customers and you'll find it's convenient, responsive, and what your customers want and expect in their modern customer journey:



01 Prospect finds and chooses you.

Show up in search results.

- + Collect reviews from current customers on the sites that matter most—Google, Facebook, etc.—to ensure new prospects have a better chance of seeing your business and your multiple locations in their online search.

02 Prospect reaches out with questions.

Add a textable number to your Google My Business listing.

- + Mobile searches are increasing and it's more convenient, especially for a retail appointment in today's economic climate, to click to call and click to text, directly from a search on the prospect's phone.

03 Prospect visits your business (or one of your locations).

Improve consumer safety.

- + Alert your customer to specific requirements related to visiting your business—mask mandates, social distance, or even curbside pick up options. You can even queue visitors by texting them when they can enter your building while they wait in their individual cars.

04 Customer delivers feedback.

Offer a direct line of communication.

- + Offer a direct line to provide feedback and you'll capture complaints before they surface in an online review. Check in on customer expectations, post-purchase needs, and get insight into future purchase plans.

05 Customer pays his/her bill.

Offer mobile payment and get paid faster.

- + With contactless payment as the preferred method for consumers today, offer an even more convenient, modern way to make a payment—via text.

06 Customer writes a review.

Collect reviews as part of your sales process.

- + Instead of a static, bulk review ask via email (which only has a 20% open rate²⁸), increase your chances of customers filling out an online review by making the ask personal—in a text message. Add it to your sales cycle so the ask comes from the sales rep your customer has already worked with and knows.



I'm here for my curbside pickup.

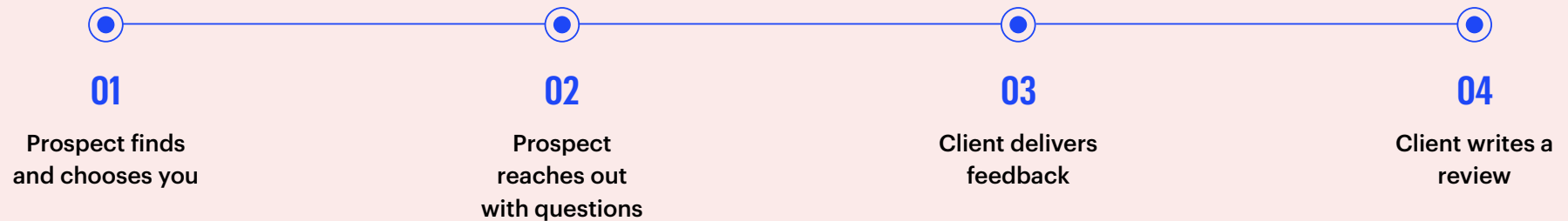
Great! Can I get your name and what vehicle you are in?

Yes, it's Sarah. I'm in a dark gray Honda Pilot.

Perfect. We'll be right out.

Surprising ways you can use text messaging in financial services.

Financial service clients want to meet you on their phones—57 million are already using mobile banking in the United States.²⁹ Implement texting into your communication plans with clients and you'll find it's convenient, responsive, and what your clients (and potential clients) want and expect in their modern customer journey:



01 Prospect finds and chooses you.

Show up in search results.

- ✦ Collect reviews from current customers so new prospects have a better chance of seeing your business and your multiple locations in their Google search. From ATMs near me to wealth management firms, prioritize reviews so your business can show up for future clients.

02 Prospect reaches out with questions.

Add a textable number to your Google My Business listing.

- ✦ Mobile searches are increasing and it's more convenient, especially for financial services questions that can be answered digitally, without an in-person visit. And when a visit is preferred, you can alert prospects about your current restrictions, what materials are needed, and who they will be meeting with—all over text.

03 Client delivers feedback.


Offer a direct line of communication.

- ✦ Financial services is built on relationships. Offer a direct line to provide feedback and you'll capture complaints before they surface in an online review or to higher management, and you'll build a better relationship with current and future clients.

04 Client writes a review.

Collect reviews as part of your client journey.

- ✦ Instead of a static, bulk review ask via email (which only has a 20% open rate³⁰), increase your chances of clients filling out an online review by making the ask personal—in a text message. Add it to your sales cycle so the ask comes from the sales rep your client has already worked with and knows.



Hi, Mindy! I hope your experience today at our branch was positive. Do you have any questions about your loan documents?

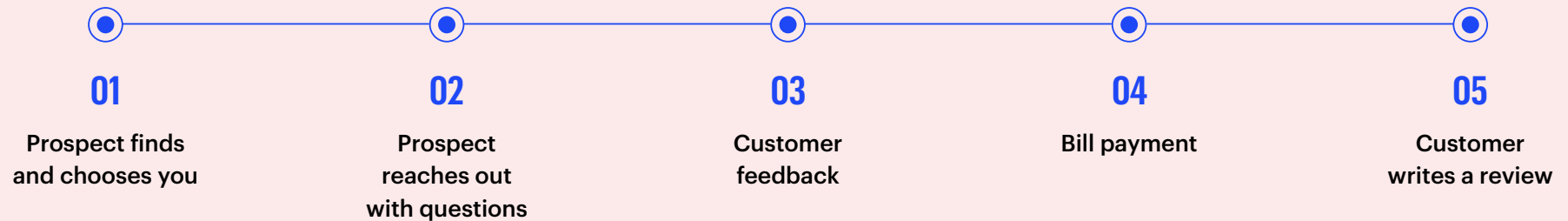
Thanks! I had a great experience. I do wish I was able to get my documents electronically though.

No problem. Let me send those over to the email address we have on file right now.

That will help me read through everything I need before tomorrow. Thank you!

Surprising ways you can use text messaging in home services.

Less than 1/3 of homeowners will pick up the phone if you call them.³¹ Implement texting into your communication plans with customers and you'll find it's convenient, responsive, and what your customers (and prospects) want and expect in their modern customer journey:



01 Prospect finds and chooses you.

Show up in search results.

- + Collect reviews from current customers on the sites that matter most—Google, Facebook, Houzz, etc.—to ensure new prospects have a better chance of seeing your business and your multiple locations in their online search. Compete against other home services search results by prioritizing Reviews as part of your sales cycle.

02 Prospect reaches out with questions.

Add a textable number to your Google My Business listing.

- + Mobile searches are increasing and it's more convenient, especially for a home services appointment in today's economic climate, to click to call and click to text, directly from a search on the prospect's phone. Texting about your current COVID-19 requirements for techs or other staff can put prospects at ease about your services, especially when it involves someone entering their home.

03 Customer delivers feedback.

Offer a direct line of communication.

- ✦ Offer a direct line to provide feedback and you'll capture complaints before they surface in an online review.

04 Customer pays his/her bill.

Offer mobile payment and get paid faster.

- ✦ With contactless payment as the preferred method for consumers today, offer an even more convenient, modern way to make a payment—via text.

05 Customer writes a review.

Collect reviews as part of your sales process.

- ✦ Instead of a static, bulk review ask via email (which only has a 20% open rate³²), increase your chances of customers filling out an online review by making the ask personal—in a text message. Add it to your sales cycle so the ask comes from the sales rep your customer has already worked with and knows.

Thanks for coming today! I've had a few bad experiences with pest control services and you are the best technician we've ever had. How do I make my payment?

Wonderful! We value customer feedback so that means a lot. You can make your payment right here actually—I'll send a link.

💰 Payment Request of \$84.00

💰 Shannon paid \$84.00
Invoice number: 2017046-8403-01
[View details](#)

Find the right Interaction Management solution that will help you:

- **Leverage every preferred messaging channel**—one secure inbox for all messages (and every location for your brand) from Facebook, Google, and more.
- **Offer speed and convenience across all interactions**—find a solution that prioritizes ease in all communications including scheduling, feedback, payments, and reviews.
- **Gather reviews easily and quickly**—a simple text has a higher chance of response than email and only takes 30 seconds.
- **Integrate with your existing tech stack**—continue work in the tools you already use: Salesforce, Yext, ServiceTitan, AthenaHealth, Dentrix, and more.
- **Convert website visitors to text conversations**—use a web chat feature that keeps the conversation going.



Press send and keep up with the modern customer experience with Podium.

Connect to your customers throughout the entire customer journey with Podium, the interaction management platform your multi-location business needs.

- **Save time**—manage all communication channels and separate systems through a single, secure platform.
- **Convert leads**—attract the right customers with higher local search rankings and relevant reviews.
- **Delight customers**—create a multi-channel, frictionless customer journey from first impression to post purchase.

[Watch a demo here](#) ↗

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