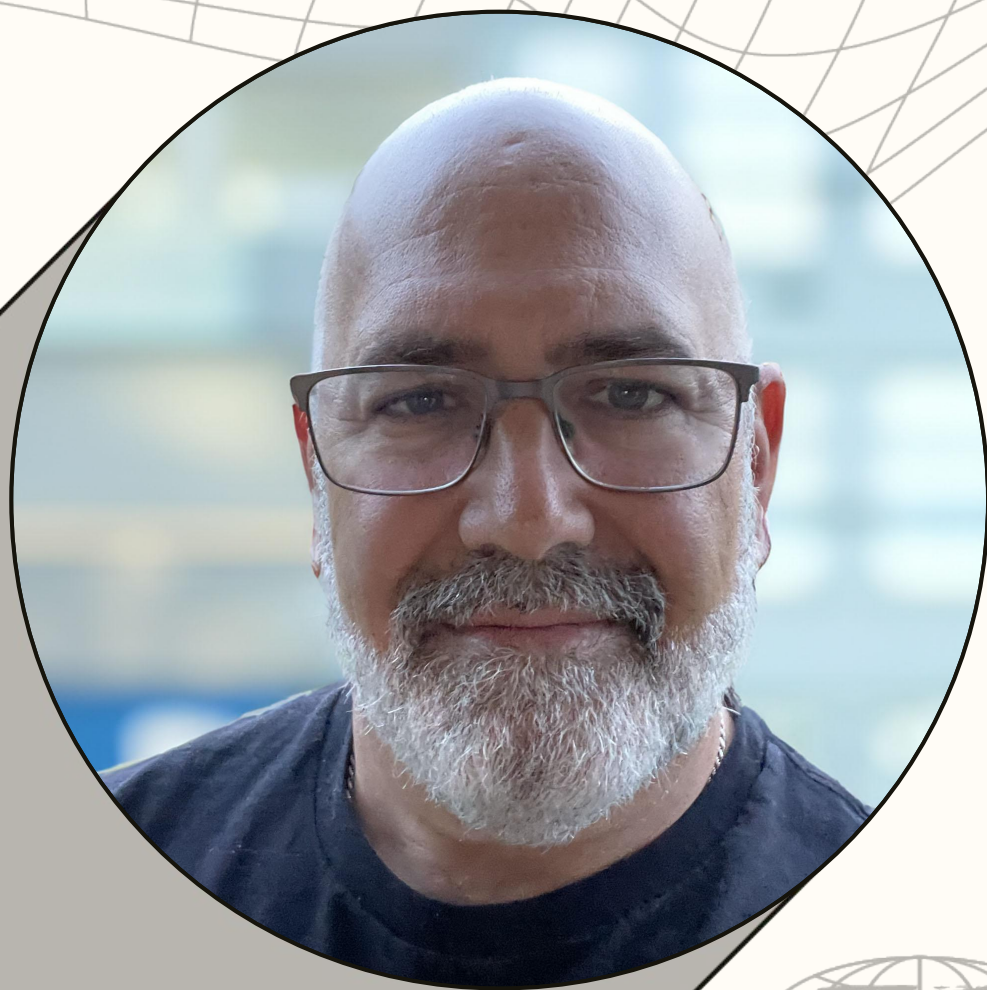# Building Compelling Multi Touch Journeys

Integrating SMS and data feeds into Forbes Advisor's cross-channel strategy and how it improved engagement and conversion.
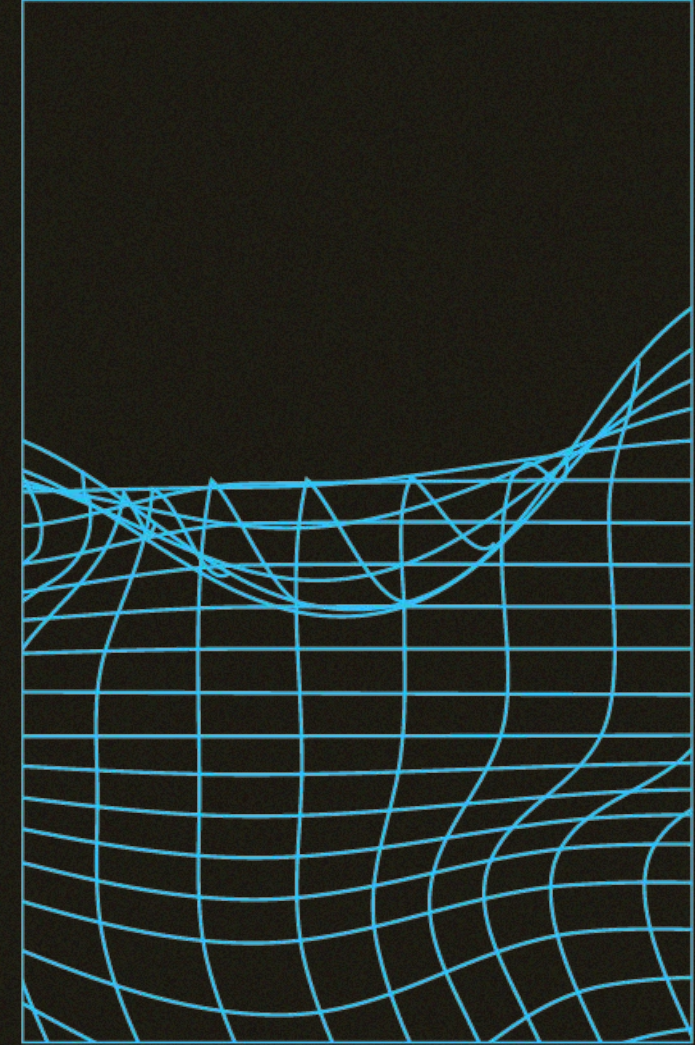
Ken Pecca

Forbes Advisor

Working in the marketing space for 15 years, starting with ink on paper (DM) moving to digital and building true omnichannel experiences. I joined Forbes Advisor in early 2022 to build, launch and manage their CRM platform MarTech stack and team..
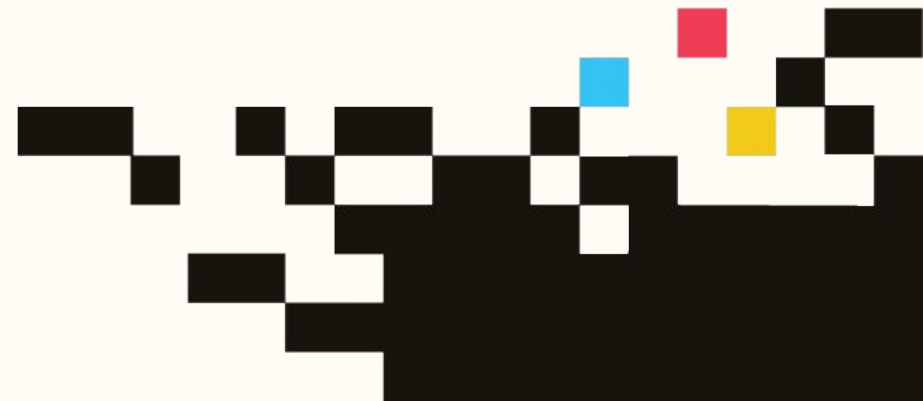
Agenda

AGENDA

Where We Started – Pet Insurance

Email-Only Performance

- Our best performing journey with opportunity for phone number capture
- Low CTR – Audience is Mobile heavy and CTR was 2 - 2.8%
- Delayed engagement – Email engagers on mobile are "procrastinators"
- Low RPL – We knew the revenue was out there, we were just not speaking to our audience the way they preferred

Initial Hypothesis:

- Add compelling dynamic email redesign by See-design
- Add SMS to boost engagement, increase CTR, and shorten response time.
- Mobile users would be more engaged with SMS
- We would increase revenue by 7-10%

Key Challenges:

- Compliance – were all of our Opt – in widgets email and SMS compliant?
- Opt-in management – We would need updated legal copy and T&Cs
- Audience segmentation – ensuring we were only messaging users that wanted it

Email-Only Performance

By The Numbers

Users

24K

AVERAGE MoM USERS

- Each user received up to 5 nurture emails
- After email 3 there was a sharp decline in OPR and CTR

Open Rate

48%

AVERAGE EMAIL OPEN RATE

- Solid OPR throughout the journey

Click Through Rate

2.8%

EMAIL CLICK THROUGH RATE

- We knew there was an opportunity to improve engagement

Why We Integrated SMS

Initial Challenge

We needed to convince SLT that it was time to test SMS

Justify additional budget for SMS.

Opportunity

Mobile heavy audience underperforming

Start with Pay as you go to get running and justify

Goal

Create compelling journeys by integrating SMS with email

Increase CTR and Revenue

Why SMS

SMS provides increased immediacy,

higher open rates, better conversions

Provide a revenue boost.

Considerations

Design & Data Feeds

- Integrating HTML optimized email
- Quote data from site
- Event Trigger
- instant quote email

Compliance

- Opt In Strategy
- TCPA concerns
- Quiet hours

Segmentation & Messaging

- Ensuring the right users received SMS.
- Easy unsubscribe
- Digital exhaustion?

Cadence & The Build

- Defining SMS timing
- Message variations
- Timing & cadence with email
- A/B testing.

Full Journey Build – What It Took

Integration
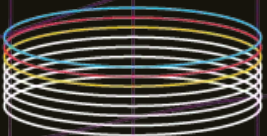What we did with data engineering

Data
How data was passed & using JSON

Building the opt in process
COMPLIANCE COMPLIANCE COMPLIANCE

Continuous iteration
If ya' aint testing… ya' aint tryin'

Integration and Data

Opt in Process

- Trigger event: We setup an event via API integration with our product and engineering teams that trigger users into Iterable, and profile updates.

- Product and Engineering work: Product teams provide back-end api integration and user fields, for updates to retrigger events and add relevant data
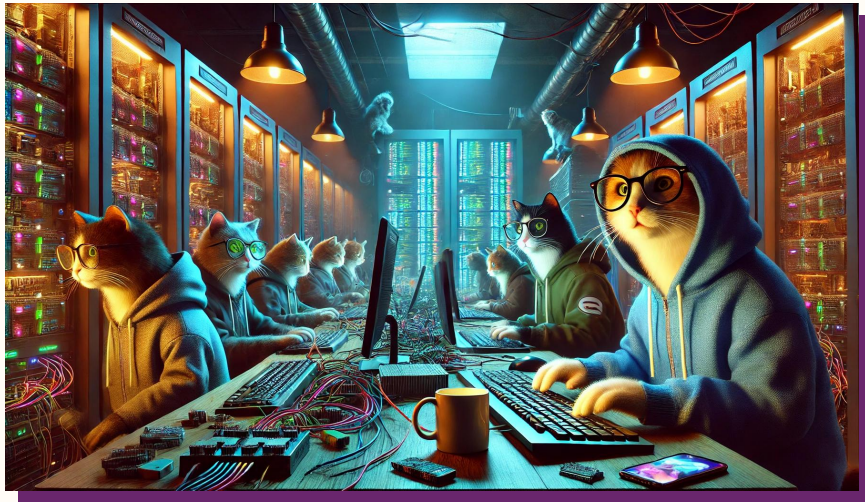
Data

- JSON payload: Working with data teams, a JSON payload is integrated into Iterable to append user fields into user profiles from incoming events.

- Update User: The JSON is integrated via the update user tile

- Data Feeds: We use fields that call back to dynamic data feeds, such as using enquiryId to unlock individual, user-specific data to use in campaigns.

Compliance & Testing

Compliance

- Smart opt in for legacy users who previously engaged with content present an opportunity to sign up for SMS.

- Journey Opt In On site; What happens to users not on mobile? They are redirected to an on-site opt in journey.

- Working with compliance is crucial when integrating SMS into marketing strategies, adherence to legal standards and regulations, safeguards the business and its customers.

Best Practices, Testing & Iteration

- Timing: Test, test and test again! Tested into several different scenarios from instant SMS to 6 hour delay with Quiet hours

- Content: Written internally and A/B tested for minimum 6 weeks
  - Personalized Vs non personalized
  - FOMO
  - Phrasing

- Quiet hours for SMS deployed to ensure best UX AND compliance

Where we are today

Increased engagement and revenue

30%

3X

+20%

30% SMS CTR

3x Email + SMS CTR
combined 17.3% (vs. 2.8% Email-Only)

Increased Revenue:
+20% MoM.

- Compelling design and timely SMS improved our overall OPR by 15%
- Adding SMS to current journeys and perfecting the timing for our audience tripled our CTR and EPC while adding 20% revenue.
- Adding SMS provided a boost to email open rate

Conclusion

✅ **Adding SMS to Email Journeys Works:** Higher engagement and revenue impact.
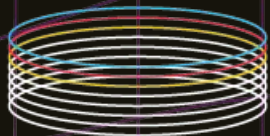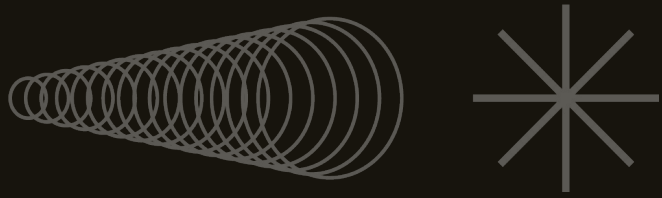
✅ **Timing and Testing Are Key:** A/B testing, STO, and audience targeting matter
"if ya' aint testing, ya' aint tryin"

.

✅ **Compliance is Crucial:** Follow opt-in/out best practices and quiet hours.

✅ **Use Data Feeds for Smarter Messaging:** Segment, personalize, and optimize.

SMS isn't a replacement—it's an essential part of a multi-channel strategy that drives results.

Check out an SMS program that isn't deadly boring

WE'D LOVE YOUR FEEDBACK

Here's how to fill out the session survey:

1. Download/Open the Activate app
2. Toggle to the **Agenda** tab
3. Tap on this session
4. Scroll to **Engagement** and tap **Survey**

BONUS

Complete the survey to earn points you can redeem for prizes at **The Market @ Activate!**

▶ **RECORDING WILL BE AVAILABLE ON APRIL 10TH!**