The Keys to Crafting an SMS-based Campaign to Reinforce Training

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Brief Intro

Vince Han
CEO and Founder
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- CTO of VitalSmarts in 2001
- MIT Sloan MBA
- Battery Ventures, Tech startups
- Founded Mobile Coach in 2013 as a powerful training reinforcement platform
Quick Poll

What are your most recent text messages?
Yesterday, 8:31 AM

Sorry I missed you, put kids to bed early last night. What time do you usually drive home?

Yesterday, 7:47 PM

Hey can you chat?

Delivered

Yes don't have a ton of time though
Pick you at 6:45am. Sound ok? Arrive at airport about an hour before flight.

Sounds good. Hopefully we can get past point of the mountain without too many construction related delays.

Flight is 8:52 and so I think that gives us wiggle room.

Cool. Sounds good. See you then.
A Few Text Message

• Texts are *proximal* – from someone close, about something close
• Texts are convenient
• Short and transactional
• No pressure’ user experience

*Key Stat: 98% of text messages are read*
What Are Your Texting Habits?

• Do you leave messages unread?
• Do you delete your messages?
• Are your texting habits different than teenagers you know?
• How are your text messages different from social media or email?
• What is the texting culture in your workplace?
How can texting reinforce learning?
The Learning Curve
The Forgetfulness Curve
Learning is a process, not an event.

Text messages gain access to mindfulness.
Learning Requires Time and Attention

Gaining the learner’s attention after training has been elusive prior to the mobile device!
Text Messages Get Through

• Channel for highest priority messages
• Easy to use! No software learning curve
• Nothing to download, install, upgrade, setup
• Phone is always nearby

You aren’t competing at the “app” level, you are competing at the “relationship” level
6 Keys to a SMS Campaign

1. Source
2. Frequency
3. Content Types
4. Voice
5. Interactivity
6. Personalization
1. Source

• Who is texting? Name the source

• Create relationship so user “saves the contact”

“Neo” “Pickles” “NIVA”

“NeMO” “Xander”
2. Frequency and Timing

- How many texts is too many?
- When do you stop sending messages?
- What time of day is best?

Soft skills reinforcement: 60-90 days
New Employee Orientation: 30 days
Webinar Series Support: 12 months
3. **Content Types**

- What does the user expect to receive?
- Needs to feel valuable. Don’t write texts with too much of a content lens
- Contextual application is better than rote repetition
Content Types

- Reminders
- Tips
- Accountability questions
- Quizzes
- Surveys/Likert
- Motivational quote and encouragement
- Challenges
Quick quiz: which of these greetings is a better fit to the 5 star system?

A. Good morning, thanks so much for calling Dr. Smith's office! This is Susan, how can I help you? B. Dr. Smith's office, this is Susan! How may I help you?
Today's tip: Identifying the gap between expected & actual performance is the first step to unbundle the problem. Check out your toolkit on p.8 for more info.
Survey Example

We really need your help to improve! Real quick: How much do you feel you've improved since our training? 1= Not at all 5= Quite a bit
Today's challenge: Teach someone how to export a CSV file from our CRM and text me back when you've done it!
4. Voice - what fits your audience?

- Friendly
- Polite
- Formal
- Deferential
- Aggressive
- Edgy/Hip

INCOMING! This is Mad Man. Over the next 30 days I'll be watching. I'll check-in to see how your mission to increase accountability is going.

Awesome - I'm stoked you’re already thinking of execution. I'll catch up with you again tomorrow.
5. Interactivity

- Asking a user to respond reinforces learning
- And makes it more engaging
- And makes it seem like a real conversation

Hi! Which of the call components do you need to work on most? Text the number:
1) Greeting 2) Questions 3) Transition 4) Close 5) Follow up
6. Personalization

• Personalized content is more meaningful
• Important for reporting purposes to see how people are doing

It's Friday afternoon, we agreed for me to check in at this time!

Tell me what your goal is this week
Text reminders are useful

Relationships and conversations are powerful
“Coach Carly is over? I am going to miss her!”

“When I feel like I do not know what I am doing your text pops up. You have helped me the most the past 2 weeks!!”
Sample Metrics

- Less than a 5% opt-out rate
- 50-75% response rates to multiple choice questions
- 25-50% response rates to open-ended questions
- 75-90% respond to something
Chatbots can drive ROI

- Texting engagement rates allow measurement of:
  - Content retention
  - Mood and perceptions
  - Skill development progress
  - Status
  - What’s going well
  - What’s not going well
Thank you!
Questions??

Vince Han:
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• Come to my stage session tomorrow!
• Griffin Hall at 1pm
• Deeper dive into writing styles for SMS
Some Tools to Consider

- Rules-based
  - Textit.in
  - Motion.ai
  - Mobile Coach
- Broadcast-based
  - Some LMS and survey tools