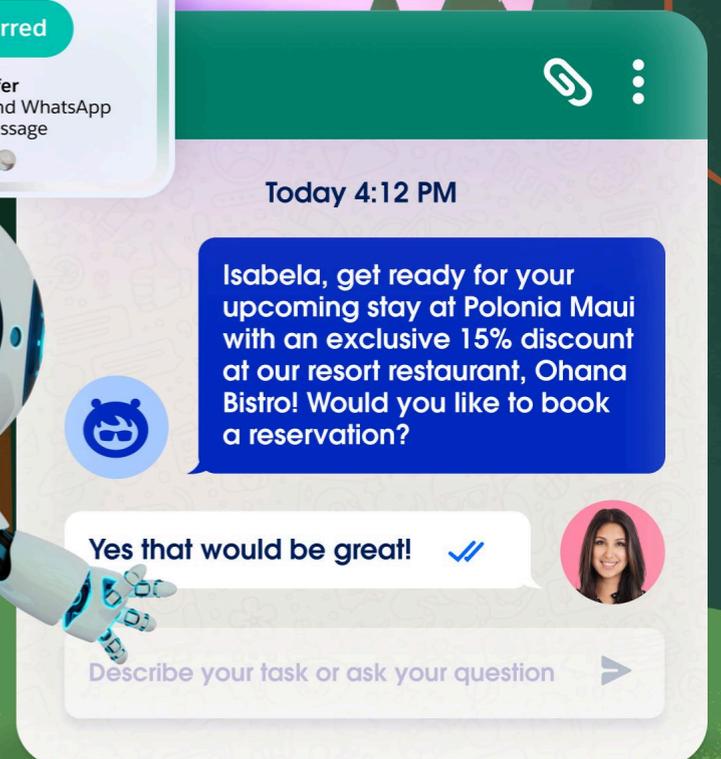# The Conversational Marketing Playbook

Increase Customer Engagement with WhatsApp, SMS, and Agentforce

salesforce

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Introduction

Your customers need personalized experiences that seamlessly integrate into their lives. With **73%** of customers expecting increased personalization as technology advances, brands face the challenge of delivering consistent and relevant experiences across the numerous channels where customers engage.

To meet these heightened expectations, brands are turning to conversational marketing strategies. These strategies focus on engaging customers through personalized, two-way conversations in real time, mirroring the seamless interactions they have in their daily lives. **Agentforce** equips businesses to execute this strategy effectively by using always-on autonomous AI, or "agents" for short. Agents can analyze customer data and deliver hyperpersonalized experiences across every touchpoint. They help make marketing engagement more fluid and responsive to your customers' evolving needs and preferences.

In this guide, you'll learn the basics of conversational marketing and discover how WhatsApp, SMS, and Agentforce offer a seamless and engaging experience for both brands and customers.

73%

of customers expect better personalization as technology advances.

* State of the AI Connected Customer

32%

of marketers are completely satisfied with how they use customer data to create relevant experiences.

* The Ninth Edition State of Marketing Report

Marketers engage customers across an average of **10 channels.**

* The Ninth Edition State of Marketing Report

What Is Conversational Marketing?

Marketing is no longer a one-way interaction. In fact, **84%** of company decision makers are reevaluating their channel resourcing to meet customers on the right platform at the right time.
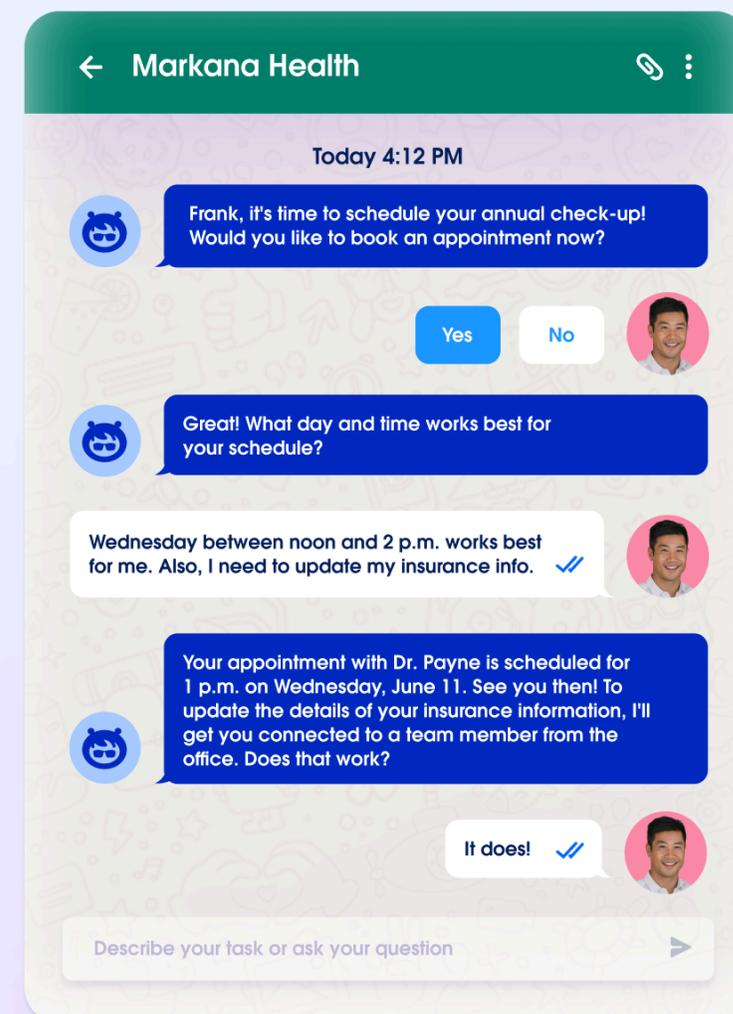
Conversational marketing meets this expectation with two-way, personalized engagement in real time. It gives customers easier, faster access to the services and products they need, all in a language they can understand. From commerce orders, to product questions, service cases, and more, customers simply can send their brand a message.

Conversational marketing breaks down the frustrating barriers between companies and customers – and builds trust and access in their place.

True two-way marketing extends beyond basic chatbots and targeted messages. It demands a strategic foundation built upon precise segmentation, hyper personalized experiences, and robust governance of messaging rules and best practices. AI agents like **Agentforce** are instrumental in achieving this vision,

powering intelligent interactions and allowing businesses to deliver truly engaging and impactful customer experiences.

Before diving deeper into how to build two-way marketing strategies, let's take a look at the trends driving its adoption.

Markana Health

Today 4:12 PM

Frank, it's time to schedule your annual check-up! Would you like to book an appointment now?

Yes   No

Great! What day and time works best for your schedule?

Wednesday between noon and 2 p.m. works best for me. Also, I need to update my insurance info.

Your appointment with Dr. Payne is scheduled for 1 p.m. on Wednesday, June 11. See you then! To update the details of your insurance information, I'll get you connected to a team member from the office. Does that work?

It does!

Describe your task or ask your question

Trends Behind Conversational Marketing

The increasing dominance of mobile devices has shifted consumer behavior toward on-demand experiences, fueling a rise in customer expectations. This has led to a surge in demand for self-service options, where customers can quickly and easily find the information and support they need.

61% of customers would rather use self-service for simple issues.
* The Sixth Edition State of Service Report

Marketers are increasingly turning to mobile channels to meet these expectations. While growth rates fluctuate across different channels, mobile messaging consistently demonstrates strong upward momentum, with message sends steadily increasing across email, push notifications, SMS, and OTT.

The rapid advancements in AI, particularly the emergence of agents, have equipped businesses to meet this growing demand. Agents can analyze vast amounts of customer data, understand their preferences, and engage in personalized conversations across various channels, from chatbots to messaging apps. This allows businesses to provide self-service options that are not only efficient but also highly personalized across every touchpoint.

These trends set the stage for conversational marketing, where intuitive interactions, personalized dialogue, transparency, and accurate real-time responses are paramount.

81% of marketers say mobile messaging will be a bigger priority in the coming year, a testament to its significant growth.
* The Ninth Edition State of Marketing Report

Channels That Maximize Conversational Strategies: SMS and WhatsApp

SMS has proven to be a powerhouse in conversational marketing, offering brands a direct, efficient way to engage with customers. With a **98%** open rate and an average response time of just 90 seconds, SMS ensures that your message is seen and acted upon almost immediately. When handled with appropriate opt-in practices and messaging regulations, SMS campaigns foster trust while respecting customer preferences.

WhatsApp reigns as one of the top communication tools and ideal solutions for companies seeking to deliver conversational marketing at a global scale. Through a **strategic partnership**, Salesforce clients can directly integrate WhatsApp journeys across marketing, commerce, and service – personalizing the user experience, providing support, selling products online, and more.

SMS provides brands with a reliable, personal, and impactful channel for customer engagement. Combined with WhatsApp, it forms a powerful duo that equips businesses to meet customers wherever they are.

57% of marketers say they can fully personalize mobile messaging experiences.

* The Ninth Edition State of Marketing Report

79% of service organizations use messenger apps, with 55% using WhatsApp.

* The Sixth Edition State of Service Report

Hi Genevieve,
You have items in your cart.
Complete your order now so you don't miss out on exclusives.
Would you like a coupon to apply to this order?

Definitely!

Great! Use code C9BTEN for an additional 10% off this order.

Benefits of WhatsApp and SMS for Conversational Marketing

Increased engagement: SMS's unparalleled open rates make it one of the most effective ways to capture customer attention. Combined with WhatsApp's massive user base and high engagement rates, these channels are prime for reaching customers where they already actively interact – whether it's promotional messages, service alerts, or appointment reminders.

Wider reach: WhatsApp and SMS channels ensure a broad reach to a diverse customer base, including those who may not actively use email or other social media platforms.

Personalized interactions at scale: Pairing SMS and WhatsApp with tools like Agentforce allows brands to create personalized and automated interactions. Messages can be tailored based on customer preferences, behaviors, or purchase history, all while maintaining a conversational tone.

Real-time communication: From confirming orders to resolving issues, both WhatsApp and SMS provide customers with immediate updates and assistance, improving satisfaction and trust.

Data-driven insights: Agents analyze customer conversations on WhatsApp and SMS, providing valuable insights into customer behavior, preferences, and needs. This data empowers businesses to refine their marketing strategies and improve customer experiences.

Enhanced efficiency: Agents automate many customer interactions, reducing the need for human intervention and streamlining operations. This frees up teams to focus on more complex issues, while still providing a seamless and consistent customer experience.

Best Practices for Investing in WhatsApp and SMS

01

Fit WhatsApp and SMS into the wider customer journey.

Engage customers where they'll be most receptive. Conversational marketing is most effective near the end of the funnel when the customer desires ease of communication and use with your brand.

02

Segment carefully.

WhatsApp and SMS channels ensure a broad reach to a diverse customer base, including those who may not actively use email or other social media platforms.

03

Respect the guidelines and rules across messaging channels.

Following rules, guidelines, and best practices means you'll achieve greater message delivery efficiency and not oversaturate messages.

04

Move customers through conversion journeys.

From confirming orders to resolving issues, both WhatsApp and SMS provide customers with immediate updates and assistance, improving satisfaction and trust.

05

Test and analyze your results.

Perform A/B tests with Agentforce and monitor your results in real time to increase ROI and optimize messages as you go.

06

Make use of available features.

Use Agentforce to set predefined guardrails to communicate your brand voice, tone, and message with different character counts, formatting options, emojis, CTAs, and more.

Digital Marketing Platforms and Conversational Marketing

Marketers use an average of eight different marketing tools and technologies to collect data, with 78% using mobile marketing. This influx of data presents both a challenge and an opportunity. Yet marketers aren't the only ones experiencing change. As customers expect personalized experiences, they also expect companies to respect their data, preferences, and privacy.

73% of customers feel brands treat them as unique individuals, but only 49% feel brands use their information in a beneficial way.

* State of the AI Connected Customer

These trends have raised the need for companies to adopt digital marketing platforms. They handle the data influx, enabling AI-powered personalization at scale. These platforms use agents to automate tasks, streamline workflows, and deliver personalized, relevant messages across channels, all while respecting customer privacy. This allows businesses to execute successful

conversational marketing at the scale they need – building stronger customer relationships.

Agentforce facilitates this collaboration by bringing the power of agents to the Salesforce Platform. Our Customer 360 unifies data across your business and departments into one view of the customer. Together, agents with employees can take action in any app, like Marketing Cloud, around this shared customer view to improve experiences, increase productivity, and boost revenue.

Deliver Connected Conversational Marketing with Agentforce

To effectively execute conversational marketing, businesses must break down the silos between departments like marketing, sales, and customer service. This requires a connected approach where data flows freely across teams, providing a holistic view of customer interactions and ensuring a consistent experience across all touchpoints.

Agents play a crucial role in creating this connected experience. By analyzing customer data across all touchpoints, from website visits and social media engagement to customer support interactions, agents can autonomously provide a comprehensive understanding of individual customer needs and preferences. You can scale, analyze, and optimize every conversation with your customer – fostering trust, driving performance, increasing revenue, and building long-term relationships.

79%

of customers expect consistency across departments – but 56% often have to repeat information to different representatives.

* State of the AI Connected Customer

Here are some of the benefits of connected conversational marketing:

Automate engagement across all channels.

Engage customers where they'll be most receptive. Conversational marketing is most effective near the end of the funnel when the customer desires ease of communication and use with your brand.

Boost marketing performance with intelligent insights.

WhatsApp and SMS channels ensure a broad reach to a diverse customer base, including those who may not actively use email or other social media platforms.

Personalize moments with real-time data with Agentforce.

Use agents to autonomously engage customers with personalized moments and optimize every experience using real-time data across all channels in customer journeys.

Continue the conversation.

See how Salesforce Marketing Cloud helps you make the most of every moment. Learn more

Ready to get started? Let's chat