



# Email, Meet Phone Calls

How to improve customer journeys  
and drive more revenue from email



# The State of Email Marketing

## EMAIL IS ESSENTIAL

People love to say email is dead. Yet, with each passing year, we find ourselves reaffirming its value. In truth, email continues to be one of the most effective channels when it comes to driving sales and building lasting relationships with customers. *Just take a look at these numbers:*



Email has the highest ROI of any digital channel with a \$38 dollar return for every \$1 spent.<sup>1</sup>



73% of marketers agree email is core to their business.<sup>2</sup>



Over 55% of marketers plan on increasing their email marketing budget in 2016.<sup>3</sup>

## BUT IT'S GETTING TOUGHER

Email isn't going anywhere, but research shows it is getting tougher to stay competitive. Marketers are in a constant battle to improve deliverability along with open and engagement rates.

- The median email click through rate in the U.S. is only **1.3%**.<sup>4</sup>
- **35%** of marketers say increasing subscriber engagement is their #1 marketing initiative in 2016.<sup>3</sup>
- While still the highest ROI marketing channel, the returns marketers are measuring from their email programs have been on a slow and steady decline over the last several years - dropping from **\$40** in 2007 to **\$38** today.<sup>6</sup>

## MOBILE HAS BECOME THE NEW BATTLE GROUND

Mobile has given rise to the omnichannel customer who expects a one-to-one experience across channels and devices. Today, a winning email strategy depends on delivering personalized emails that are seamlessly integrated with the customer experience.

- **53%** of emails get opened on mobile devices.<sup>1</sup>
- **64%** of top performing marketers have integrated email with their overall marketing strategy.<sup>2</sup>
- **84%** of high-performing marketers align their mobile campaigns to email campaigns, recognizing the cross-promotional opportunities between these two channels.<sup>2</sup>

# Thankfully, phone calls and email have teamed up to save the day

**Marketers are realizing email doesn't work in today's omnichannel landscape without a full picture of the customer journey - and that includes phone calls.** If email marketers are blind to the most important interaction a person has with a brand, they can't deliver a relevant, customer experience when it comes to email or any other point of engagement. Worse yet, they can't measure true ROI or make informed decisions because they have no idea what happens offline.

Call intelligence technology brings a rich layer of customer data marketers need to survive today's omnichannel world. It also brings a much needed level of convenience and personalization to the email experience. Giving people the option to call directly from your email or landing page will boost engagement rates - especially with mobile users who would rather not do battle with tiny screens and fat thumbs.



# Email as the Linchpin of the Customer Journey



**Q&A with Blake Miller, Director of Product Marketing,  
Salesforce Marketing Cloud**

**Q: How important is email to creating a customer journey that's completely personalized and 1:1?**

**A:** Email is the linchpin of the customer journey. It's been around for well over 15 years and as much as we've looked at other channels to surpass or supplant email, it really hasn't happened. Email continues to be relevant because it has a place at every step of the customer journey, from the traditional marketing side to onboarding new customers, to handling customer service issues. As a company, you want every interaction that you have with a customer to be on brand, and having a consistent email experience across the customer journey allows you to do that.

**Q: How do you look at offline engagements like phone calls as a part of your customers' journeys?**

**A:** The beauty of having an open platform, like Salesforce Marketing Cloud, is that you can bring together your online and offline data to create a single view of the customer. Traditionally we've done this with point of sale data, ecommerce data, and shipping information. Bringing phone calls into the Marketing Cloud gives marketers another way to build campaigns that effectively and consistently communicate with customers.

**Q: What's the most common mistake or pitfall you see among marketers who are striving to be customer-centric?**

**A:** Large B2C companies have a mountain of data available, so one of the biggest challenges marketers face is figuring out how to actually put this data into practice to improve the customer journey. Marketers typically run into issues with having enough resources - manpower and technology - to leverage all of their data. Also, when an organization is siloed, with different departments responsible for various parts of the customer journey, it can be difficult to create a consistent experience for the customer. Becoming a customer focused company doesn't mean making a few changes in sales and marketing - it requires widespread organizational change.

**Q: Any other interesting trends you're keeping your eye on in the email world?**

**A:** Email is going to continue to be at the center of the marketing world for two reasons. First, it's the preferred channel for customers - and not just for the older generation. A recent study found that 73 percent of Millennials prefer to receive communication from a business via email. The other reason is that email is the key to identity-based marketing and advertising. Everyone uses their email to sign into their various accounts - whether it's reward programs, banking, shopping or other services. Most of their activity is tied back to their email address, which is incredibly valuable information for marketers who want to create a more 1:1 experience for their customers.

# Email Gets an Upgrade from Phone Calls

**You may be thinking that sticking a phone number in an email is nowhere near groundbreaking. You think it's difficult to track. And who makes phone calls, anyway?**

The truth is phone calls are no more dead than email. Mobile has caused a huge upswing in consumer phone calls - BIA/Kelsey estimates that by 2019, 162 billion people will call businesses from their mobile phones - that's more than double the calls since 2014.<sup>6</sup> That's right, mobile has made phone calls an extremely relevant part of today's omnichannel customer journey.

Not only are calls on the rise, new **call intelligence** technology for email marketers makes it easy and scalable to track phone calls, capture relevant information from each phone conversation, and apply those insights to every aspect of your email marketing. There is no question, everything about email marketing works better when you know when and why people call.

*\* Invoca's **call intelligence** for email is specially designed to bring the power of phone calls to your email marketing with all the transparency, automation, and customer insights you need.*

**HERE ARE FIVE WAYS** that Invoca for Email can give your email marketing the boost you've been dreaming of:

- 1.** Increase mobile email engagement with click to call.
- 2.** Trigger emails in real time based on caller activity.
- 3.** Improve audience segmentation with call intelligence.
- 4.** Use conversation insights for better personalization.
- 5.** Get a clear picture of email ROI.



# Increase mobile email engagement with click to call

## WHY IT MATTERS

People want to call you. Why? Maybe they prefer human interaction. Perhaps they have a question. They could be on the go, and it's just easiest. Have you ever tried to fill out a long form with your thumbs?

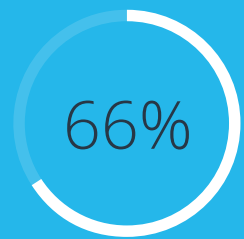
Whatever the reason, there are a lot of people who would rather make a phone call than hassle with a small touchscreen. In today's omnichannel world, it's your job to give them the option to connect however and wherever they want.

By putting click to call buttons and phone numbers in your emails, you'll not only establish trust (people trust brands that display a phone number) you'll increase your email engagement and conversion rates. Make life a little easier for you and your audience by empowering them to call you, when it's most convenient for them.

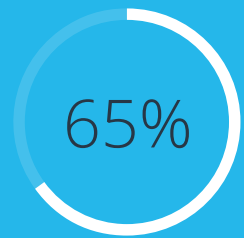
## DID YOU KNOW?



162 billion people will call businesses from their mobile phones by 2019.<sup>6</sup>



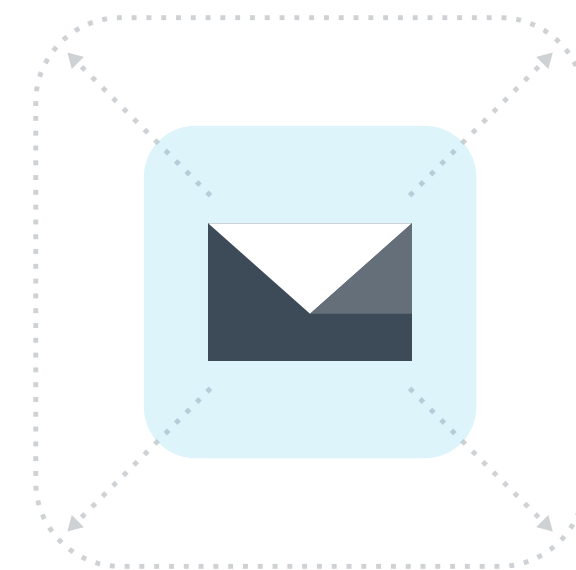
66% of millennials are likely to contact a business via phone call versus 24% who would use social media.<sup>7</sup>



65% of people have called a business in the past month versus only 24% who have filled out a web form.<sup>7</sup>

Phone calls play an especially critical role in the path to purchase when it comes to considered purchases - people don't usually drop hundreds or thousands of dollars without getting personal assistance. And in industries like insurance, travel, telco, or financial services that rely on conversations to drive sales, calls are critical.

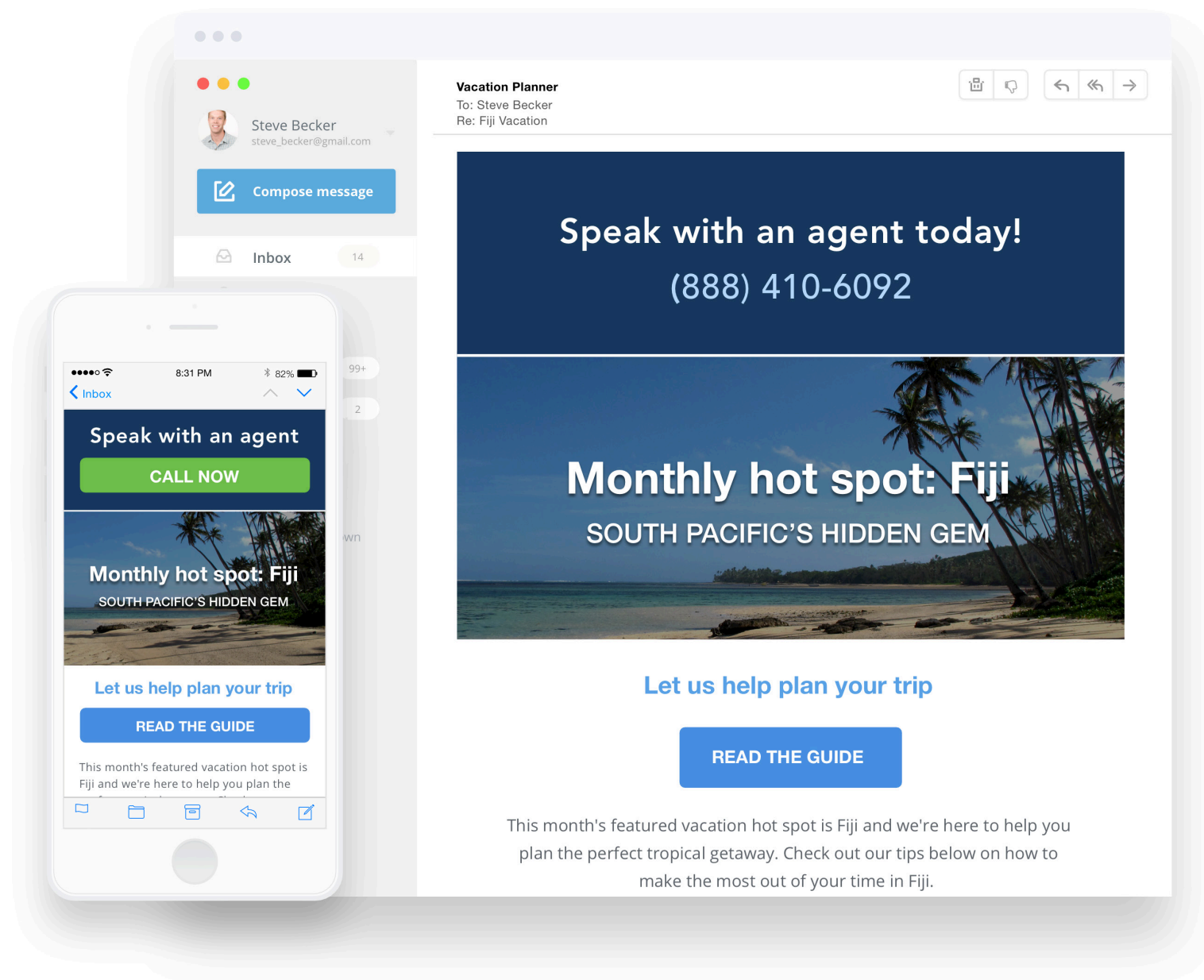
Phone calls will be your highest quality interactions, and you'll have the benefit of talking to your prospects in real time, versus web leads which can be extremely difficult to reach - darn those fake names and phone numbers that are so popular on web forms.





# How to

Integrating phone calls into your email with Invoca is easy.



1. First, give Invoca a few details about the email campaign you're sending and how you want your phone number to appear in the email.
2. Copy the snippet of code generated based on your specifications and copy it into your email template.
3. Third, hit send!
4. When your customer opens their email, they either see a click to call button or a phone number depending on their device.
5. Now, sit back and wait for the calls to come in - we'll route them to the right destination, enrich customer profiles, and give you the attribution for calls you always wanted, but couldn't previously attain.



## Trigger emails in real time based on caller activity

### WHY IT MATTERS

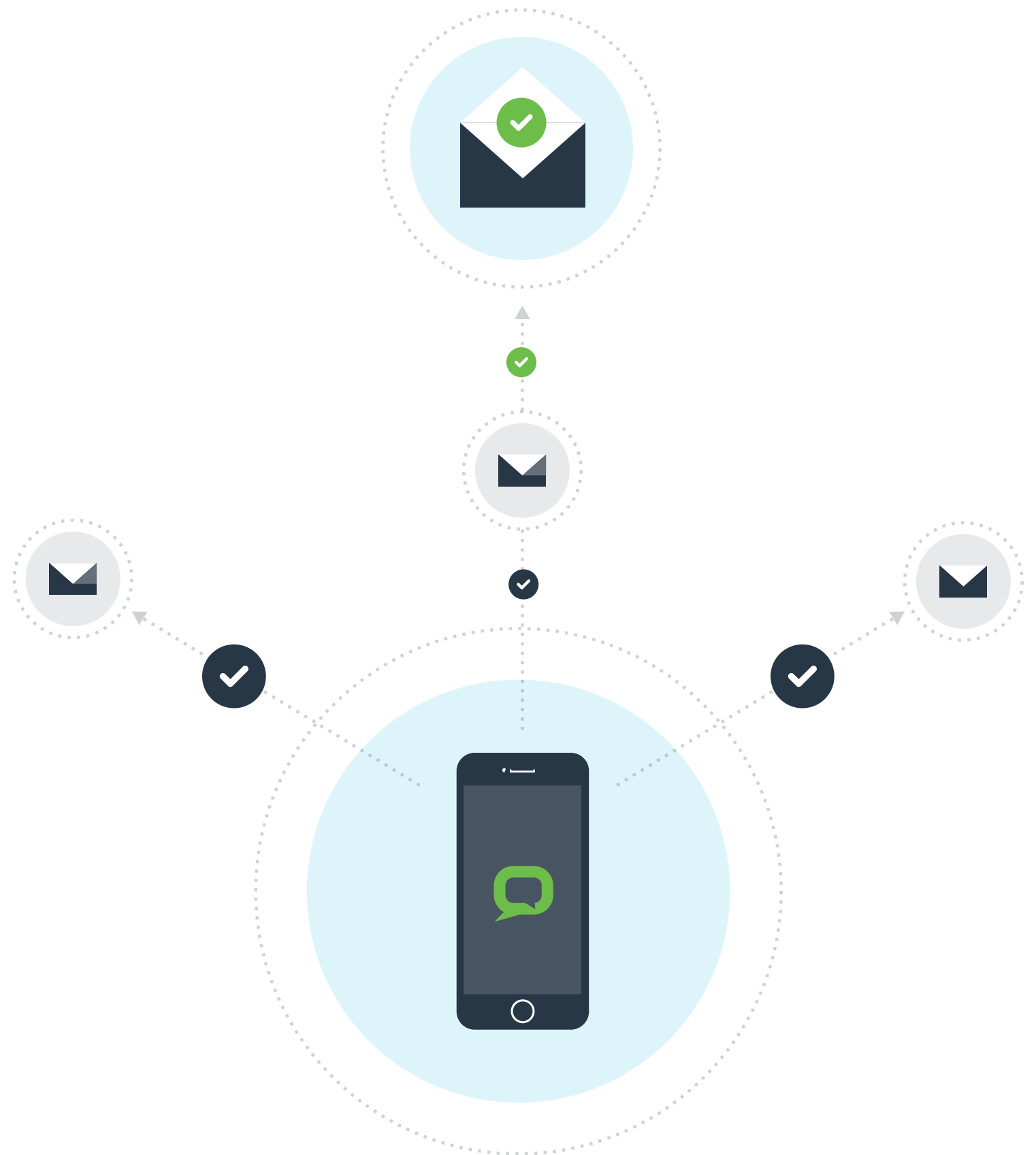
You send emails based on digital interactions, why not do it for calls too?

By incorporating phone calls into your nurturing and email flows, you ensure that you deliver a consistent message across channels. And better yet, your audience feels like you're listening and you actually know who they are.

### DID YOU KNOW?



High-performing marketers are 2.3x more likely than underperformers to trigger personalized emails in real time based on events.<sup>2</sup>







## How to

When Invoca is integrated with your email marketing platform, you can update customer records with caller activity and set your system to respond accordingly.

The laptop screen shows a customer profile for Sarah Jones with contact information and an engagement table. The engagement table tracks actions across three campaigns: 'Don't Miss Out!', 'Weekly Newsletter', and 'Members Only...'. The actions tracked are OPENED, CLICKED, CALLED, and CONVERTED, indicated by green checkmarks or red X's.

ENGAGEMENT					
CHANNEL	CAMPAIGN	OPENED	CLICKED	CALLED	CONVERTED
	Don't Miss Out!	✓	✓	✓	✓
	Weekly Newsletter	✓	✗	✗	✗
	Members Only...	✓	✗	✓	✓

1. Set Invoca to capture the data points you need. Common data points include customer ID, campaign name, or cookie data.
2. When a prospect calls from one of your marketing campaigns, Invoca will automatically collect that information and tie it to the customer record in your email marketing platform.
3. Now that call data is synced with your email data, you can set your email marketing platform to send emails based on a variety of caller attributes from Invoca, including their geographic location, if it's a new or repeat caller, demographic details, what was said on a conversation, and more. *(Read more in part 3 and 4)*



# Improve email personalization with conversation insights

## WHY IT MATTERS

Your customers expect a personalized, one-to-one experience, and you are probably making big strides with this on the digital side. But what about phone calls? Think about how much more powerful your personalization would be if you could learn about your prospects and customers by knowing what they are saying in their phone conversations with your brand.

These insights are critical. Without understanding who's calling and what happened on those phone calls, you're in serious danger of sending inconsistent or irrelevant messages. Do you really want to send an abandoned cart email to a customer that just converted over the phone?

These insights are critical, and Invoca for Email enables you capture them in an easy and scalable way. Automated conversation analytics scan a conversation for the key signals and events that are important to you.

You can capture things like the outcome of a phone call, product interest, upsell opportunities and anything else you want. There are a ton of valuable clues and information about your customers in each conversation.



## DID YOU KNOW?



Personalized email messages increase click-through rates by an average of 14% and conversions by 10%.<sup>8</sup>



Personalized email delivers 6x transaction rates.<sup>9</sup>



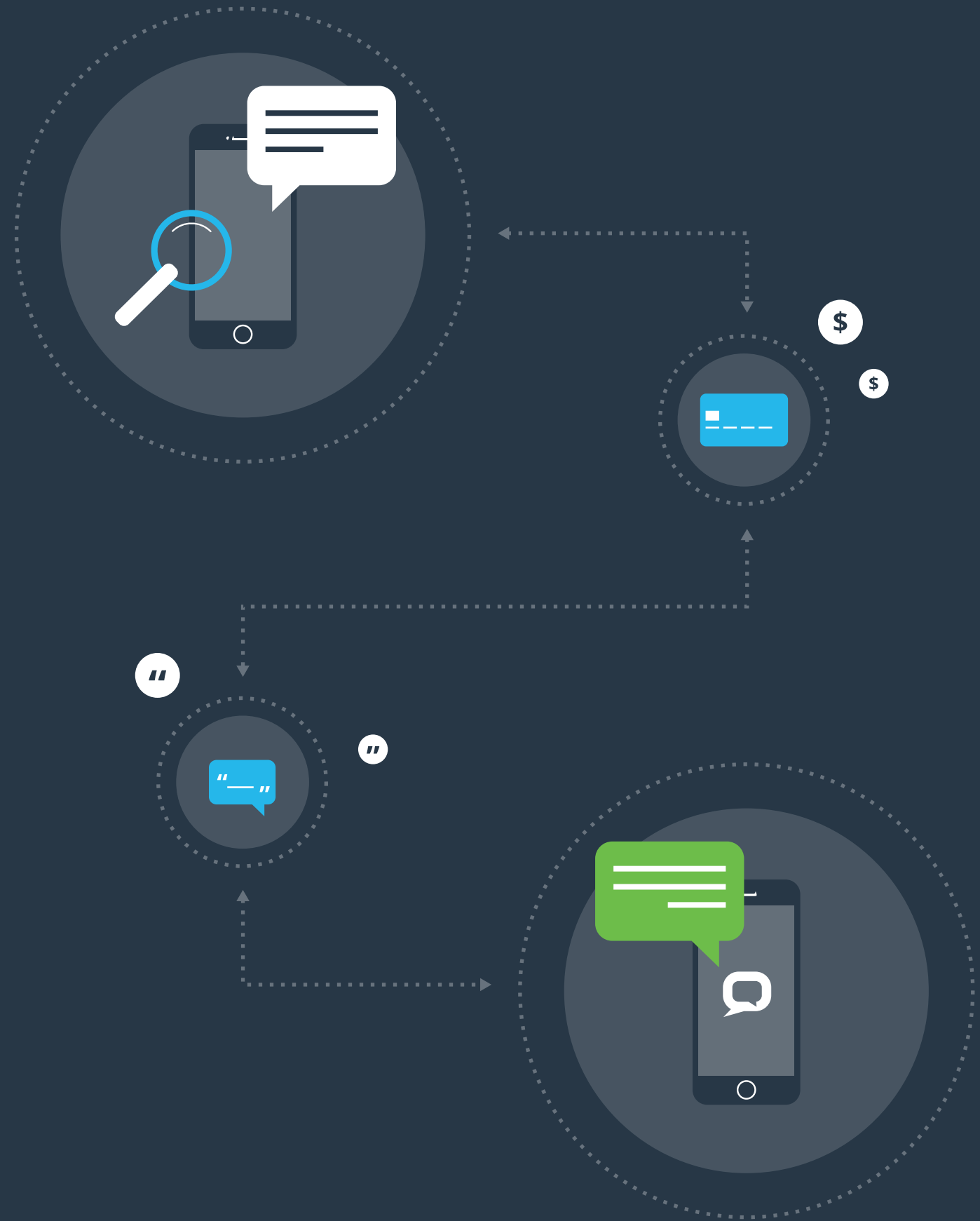
## How to

1. Configure Invoca's conversation analytics to scan for keywords or phrases within a phone conversation. These phrases will be unique to your business and should indicate key events that occur during a conversation.

*A few commonly used signals include:*

- Product names
- Competitor names
- Purchase signals such as confirmation number or credit card number

2. Tie these valuable data points about what was said to customer records in your email platform.
3. Optimize your emails based on insights gained through real customer conversations.





# Use a rich, new layer of customer data for better audience segmentation

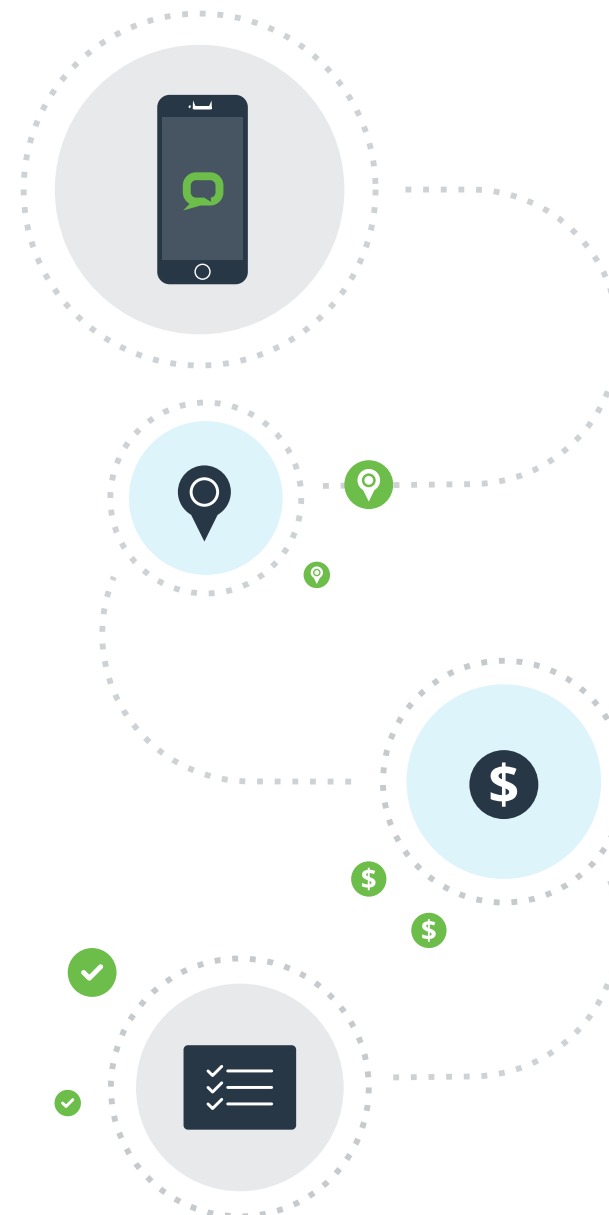
## WHY IT MATTERS

Effective audience segmentation is your ticket to scalable personalization across channels and devices - and we know a personalized customer experience means more revenue for your brand. The challenge is making sure the information in your database is accurate and complete. But how often are your email records full of holes with wrong names, missing phone numbers, and other inaccurate information?

## DID YOU KNOW?



Segmented campaigns drive a 760% increase in revenue.<sup>5</sup>



With Invoca, you can dramatically improve the data you have available to segment and personalize your email marketing campaigns. You get the customer to sign up, and we'll help you fill in the information you want but could never ask for an email sign-up. When you drive a call through Invoca, we'll capture dozens of different data points, including:

- Geographic location
- Age and gender
- Demographic information
- Household income
- New or repeat caller
- Call outcome
- Conversation details like stated product interests

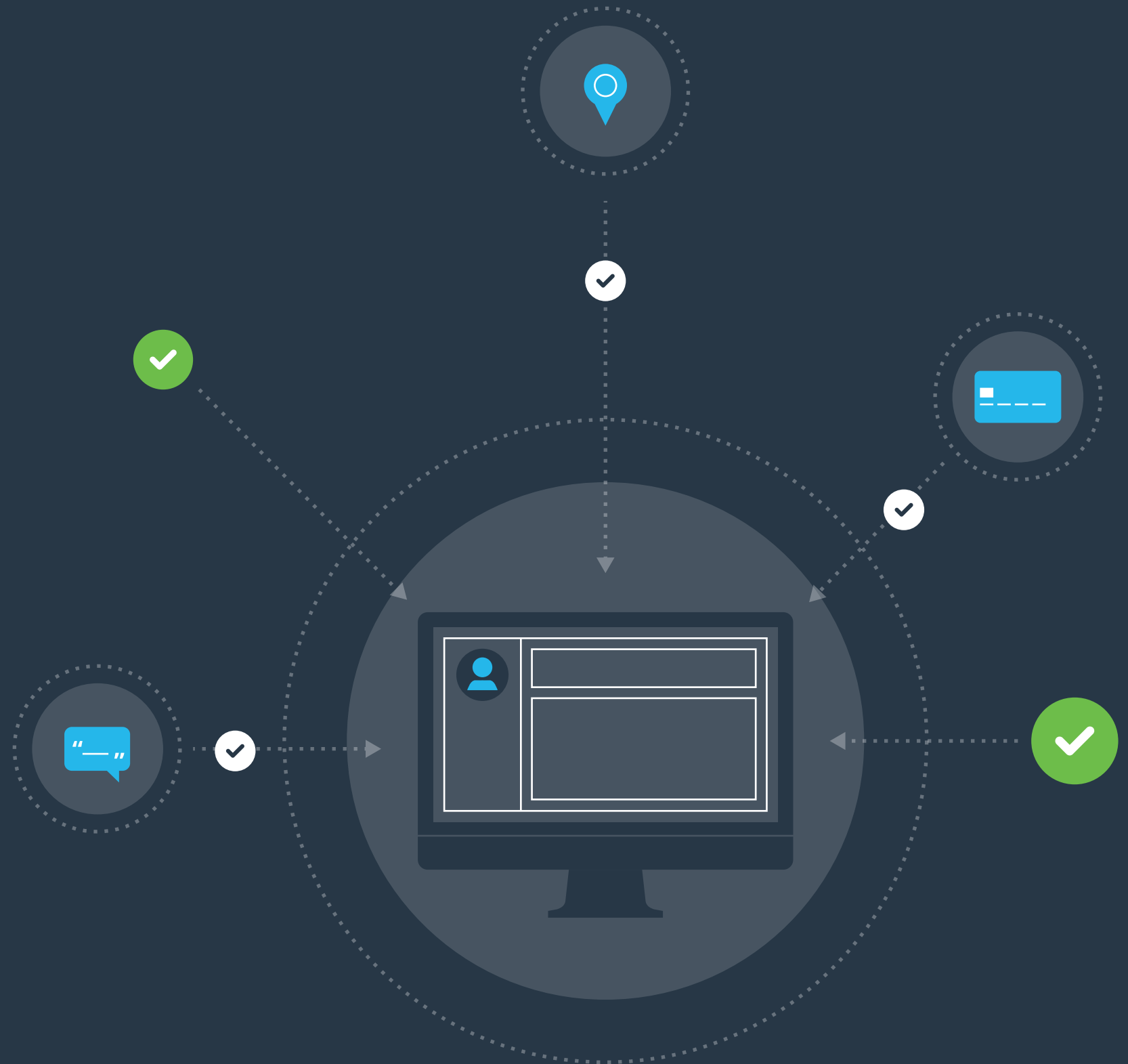


## How to

1. Add these data points to customer profiles in your email marketing platform or customer database.
2. Create segments based on these data points.
3. Personalize your messages based on the unique attributes of these segments.

*For example:*

- Use geographic region to determine which product to highlight.
- Use products mentioned during calls to optimize your dynamic content.
- Improve customer segmentation using demographic data like age or household income.



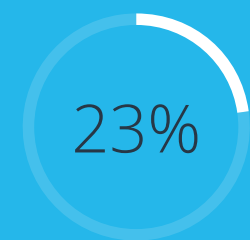


# Get a clear picture of email ROI

## WHY IT MATTERS

Marketers can't get away with gut feelings anymore. You have to be able to prove marketing ROI...with actual numbers.

### DID YOU KNOW?



Only 23% of marketers say they measure what happens after an email click.<sup>9</sup>

When was the last time you sent a campaign you were sure was going to hit it out of the park, only to be disappointed with the results?

The audience is right, the creative is great, and the call to action is perfect. But then the data doesn't match: open rate is solid. Clicks are through the roof. Conversions are terrible. Could it be that people were simply converting over the phone? The answer is "Yes!"

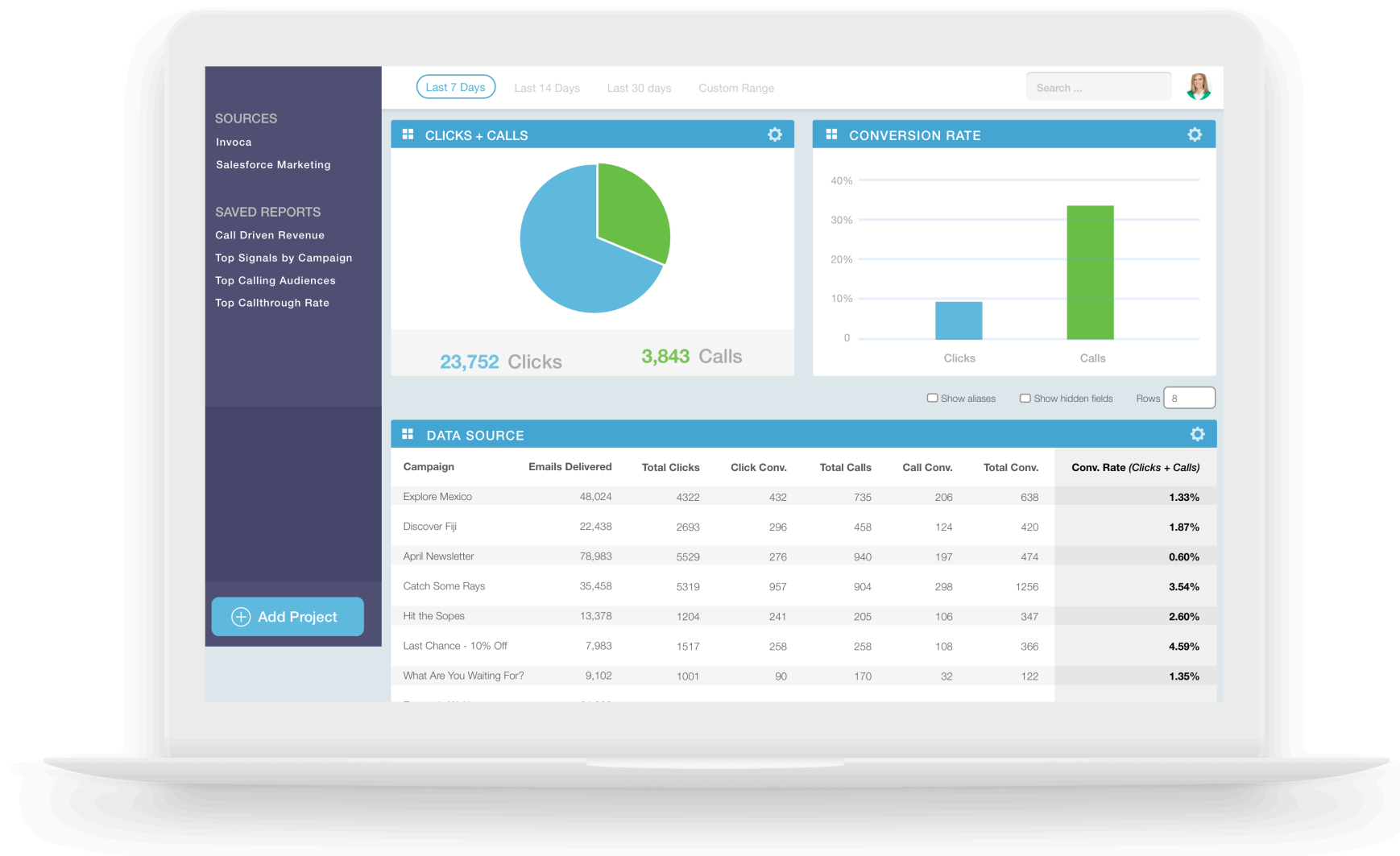
Invoca solves this blind spot by bringing phone calls to your email marketing dashboard so you can track success in terms of clicks and calls. In other words, you're

going to be able to prove your email marketing is a lot more valuable than you've ever been able to demonstrate before.

You'll not only be able to attribute actual revenue dollars to phone calls and emails, you'll be able to conduct A/B tests and make data-backed optimizations that actually result in more clicks and calls.

5

# How to

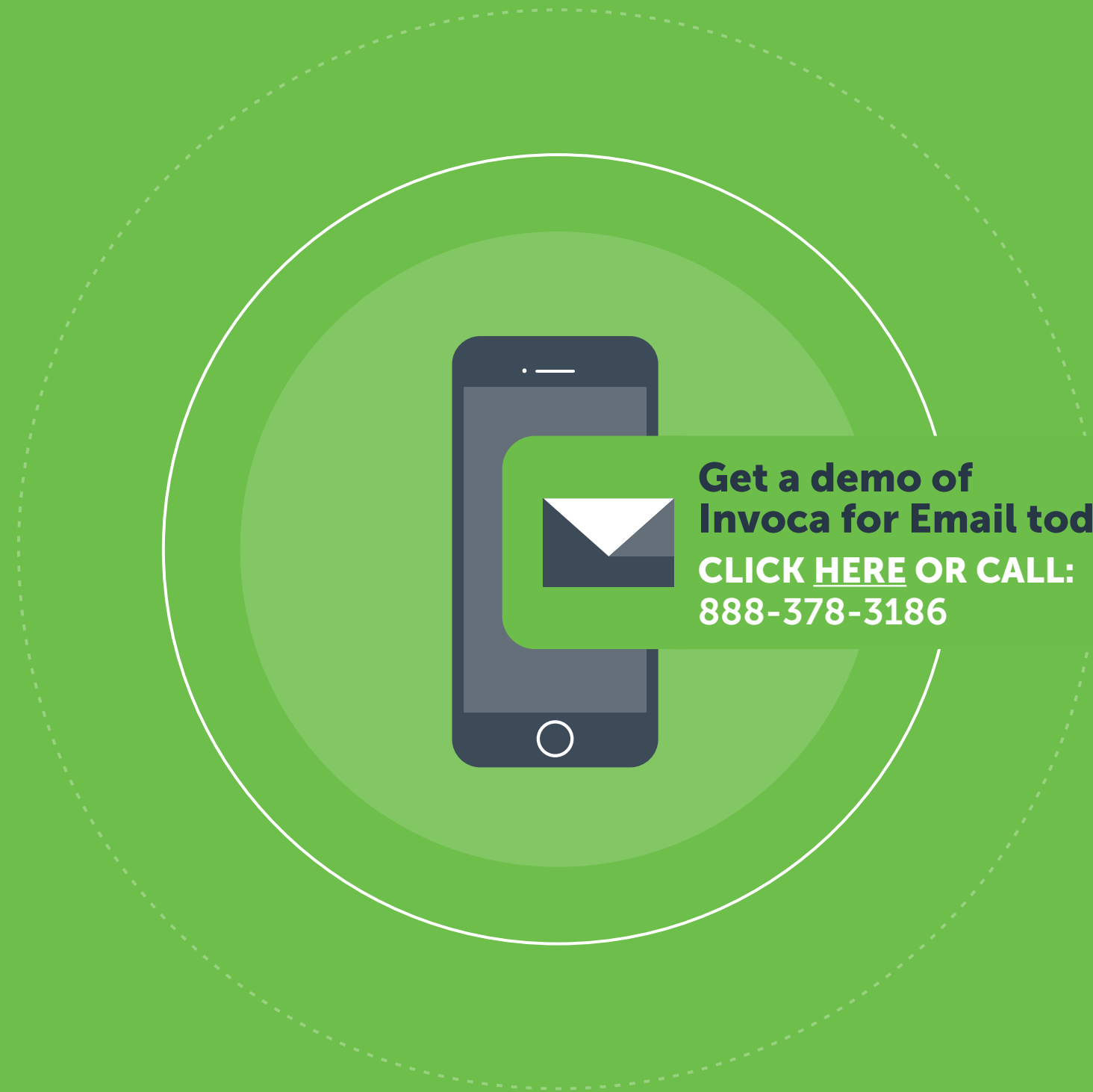


1. Integrate unique phone numbers that give you visibility into every call your email drives - at the individual email level.
2. Automatically identify what happened during the call to understand what drives success.
3. Capture valuable conversion information to understand how those calls translate into revenue.
4. Integrate this data with your email technology so you can tie revenue back to calls and the email campaigns that drove them.

# Conclusion

It's an exciting time for email marketers. There is so much room for innovation and creativity when it comes to engaging your audience. There are rich new sources of data to help you personalize, and there are powerful technologies that let you scale. True omnichannel marketing has never been more possible, but it's also never been more complicated. The good news is that most marketers haven't quite figured it out yet, and the ones who do, will come out on top.

**Invoca for Email gets you one giant step closer.**



Sources: 1. Litmus, 2016 State of Email Report | 2. Salesforce, The State of Marketing 2016 | 3. Selligent, 2016 Marketing Trends Survey | 4. Silverpop 2015 Email Marketing Metrics Benchmark Study | 5. The DMA, National Client Email 2015 | 6. BIA/Kelsey, Phone Calls: The New Currency of the Smartphone Era | 7. Invoca, The State of the Mobile Experience | 8. Aberdeen group, Email Marketing: Get Personal with Your Customers | 9. GetResponse, The State of Email Marketing 2015 by Industry