

The Marketer's Guide to Mobile Engagement:

Strategies, Tools
and Tactics to
Increase Your Mobile
Effectiveness



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The case for mobile is undeniable, with 6.1 billion worldwide smartphone users projected by 2020¹, 28 billion connected devices forecasted for 2021², and shoppers rapidly making a transition to mobile commerce. The 2015 holiday shopping season, for example, yielded double-digit growth in online retail mobile sales, with Black Friday smartphone sales up 75 percent versus 2014.³

Simply put, “mobile” is a way of life for almost all of your customers, and for many companies it’s the must-win battleground that puts you in closest touch with your buyers.

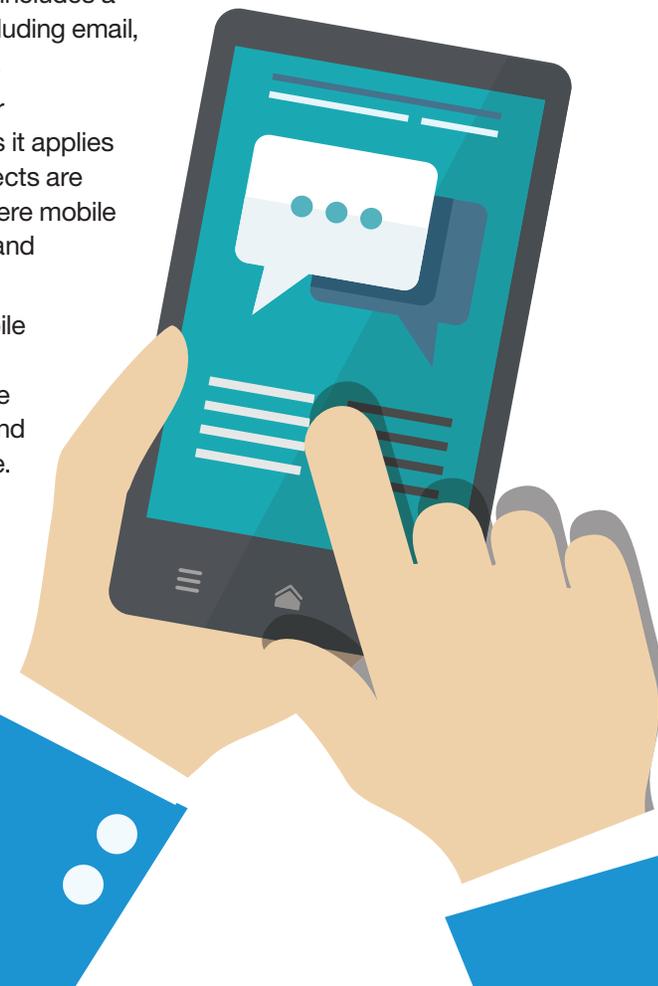
Nearly all marketers understand this, yet many organizations are still struggling with how to implement a cohesive mobile approach that understands how customers and prospects are interacting with them on mobile, what their preferences are, and how to deliver the best possible experience.

The reasons for this continued struggle are many. While the top 20 percent of marketing leaders are effectively orchestrating an omnichannel, collaborative approach to engagement that boosts revenue and profits,⁴ the rest of the pack is often hampered by a host of non-integrated solutions acquired over time, uncertainties about new mobile technology, fragmented marketing teams working in silos, and a lack of customer focus across the entire enterprise.

To help overcome these challenges, marketers should employ a *lifestyle* view of mobile that goes beyond the device and takes a broader view of what “mobile” means. This view includes the devices we readily identify as “mobile” — smartphones, tablets, smart watches and other wearable devices. However, it also includes a wide range of mobile channels, including email, SMS, push, social media, Web, etc.

Most importantly, it seeks a greater understanding of mobile context as it applies to both how customers and prospects are interacting with your brand and where mobile fits within your broader marketing and companywide objectives.

In this white paper, we’ll share mobile engagement strategies and best practices to help you produce more value for your customers, build brand loyalty and drive increased revenue. Let’s take a closer look.



Section 1: Mobile Strategy

Before you dive into specific tools and tactics, it's wise to think carefully about mobile from a customer perspective, map out how mobile fits into your efforts and how you'll judge success, and consider where mobile might be going in the future. Here are six strategies for mobile engagement success.

1 Consider how mobile fits into the customer journey.

The path to connecting with your customers begins by understanding both their expectations and their journey. Recent research indicates a significant gap between the experience marketers think they are delivering and how customers rate the experiences they have, even with their preferred brands. According to Econsultancy/IBM research, 81 percent of companies think they get it right, but only 37 percent of customers think marketers of their favorite brands really know them.⁵ Bridging this gap between perception and reality is essential.

Mapping your customer journey will help you understand the stages in your customer relationships, including discovery, research, consideration, purchase, post-purchase and loyalty, and close this customer experience gap. If you haven't already completed this exercise, we strongly advise you to take the time to do so.

Depending on your organization, mapping the buyer journey can range from a fairly simple process to one that is quite complex. Doing it

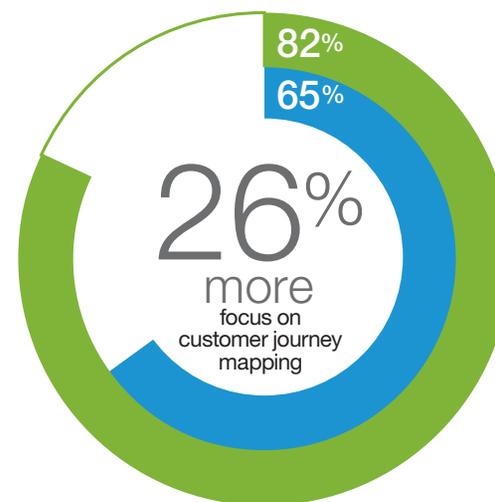
right may involve breaking traditional organizational silos and gathering a cross-functional team, from marketing and sales to service and beyond. (For full details on the customer journey mapping process, please see our white paper, "[Customer Journey Maps and Buyer Personas: The Modern Tool Kit for Marketers.](#)")

Whether you've already completed a journey mapping exercise or you're just starting out, look for opportunities where different messaging sources – mobile push, SMS, email, video, website, social media, direct mail, etc. – can influence the intent of your customer down the path to purchase. In particular, effective mobile marketing has huge potential to bridge the customer experience gap. Recent Forrester research has found that within the digital business landscape, mobile is the only channel that is used to engage the customer at every stage of the customer life cycle.⁶

You might, for example, find gaps in messaging that a location-relevant push notification could fill more effectively than an email message or straight web copy. Similarly, you might discover places in the journey where contacts frequently stall – perhaps a strategically timed SMS might

help nudge them along more effectively than your existing touch point? Would an app help you push out relevant product content that could help reduce customer service calls or returns?

Path finders: Torchbearer CMOs are studying the customer journey more carefully



● Torchbearer CMOs ● Market Follower CMOs

Source: IBM, "[Redefining Markets: The CMO Point of View](#)"

2 Aim for the right message at the right moment.

How do you identify the moments that matter most to your customers, especially when they are on the go? What if you could create special moments and turn the mundane into memorable with the help of mobile marketing? The right mix of technology, strategy and tactics are enabling more marketers to achieve this super-relevant engagement, by design and at scale.

Well-timed mobile communications (like an SMS message or push notification) can alert your customer to both good news (“your order has shipped”) and bad news (“your flight is delayed due to weather conditions”). This type of proactive mobile engagement can deepen relationships between your brand and your customers.

Delivering the right message at the right moment across channels and devices typically requires analyzing data, understanding behaviors and setting up smart, automated content triggers. It also involves crafting the right tone, one that is more immediate, personal and right-to-the-point. In other words, a message delivered

View the video



by SMS or push to a customer that’s running through the airport better be timely and worth that person’s interest.

With video consumption on mobile growing at a rate of 55 percent annually,¹ delivering the right message at the right moment may mean looking beyond text when considering your content options. For example, a text message from a home security company linking to a helpful video about remotely activating an alarm monitoring system could be enormously useful to customers who are on vacation.

Keep in mind that delivering the right message at the right moment isn’t just about selling something. Try creating content that helps your contacts solve problems, buy smarter, and even find interesting things they might not otherwise have uncovered. Whether you’re interacting via email, mobile push, SMS or another channel, mixing value-add content into your more promotion-heavy messaging will help keep contacts engaged.

3 Think context and usability.

The ascendance of mobile raises the stakes for the attention marketers have to devote to context and usability. For example, when an email (a channel) is viewed on a smartphone (a device), the combination of channel and device produces this third aspect of context and usability. The same customer viewing the same email on different devices might interact with the content completely differently, perhaps because that individual is literally in motion — checking email while walking through a mall, for example.

Think of the difference between how people interact on devices as a “lean in” action (perusing one’s inbox while waiting in line) versus a “lean back” action (kicking back on your living room couch with your tablet while watching a football game).

With the former, contacts are more likely to be in transit with less reliable Internet access. With the latter, these customers are probably more relaxed and in a better position to consume long-form content. Understanding

these lean-in and lean-back contextual elements, and what works best for each consumer, is critical to creating effective mobile engagements.

The higher expectations of mobile users bring with them an inherent impatience. According to a study by Ericsson measuring cognitive load (an indicator of stress), patience may be a virtue — but not for mobile users. Participants’ responses to mobile performance delays were similar to that of watching a horror movie or solving a mathematical problem and greater than waiting in a check-out line at the grocery store.¹ This finding should flavor your strategy, specifically in relation to streamlining mobile processes and reducing friction.

Not only are they less patient, mobile users don’t spend the same way, either: According to a survey of U.S. shoppers, only 6 percent said they made impulse purchases on their smartphones, compared to 13 percent on desktops and 81 percent in stores.⁷

The bottom line is that as you’re building out your mobile strategy, you’ll want to consider context and usability as you’re thinking about messaging and visuals.



4 Aim to orchestrate an omnichannel experience.

For many marketing organizations, mobile is a “good news, bad news” proposition. The good news is that you have a ton of exciting opportunities to engage with your customers in ways that weren’t possible just a few years ago. The bad news is that these individual solutions probably originate from disconnected marketing teams that are most likely not synched and orchestrated to improve the customer journey. You have an app here, an email service

there, and you probably use SMS, but the customer experience among these channels is seriously disjointed.

Soaring consumer expectations for a more seamless experience mean your challenge is figuring out how you can use data gathered across devices and platforms to create a more rewarding cross-channel experience.

For example, how might behaviors taken in your mobile app impact the content a customer sees in your emails or on your website? Should a

contact with your call center result in a related SMS follow-up? If you’re serving an ad in a contact’s Facebook feed via smartphone, how could you use everything you know about that person to deliver the most engaging ad?

Additionally, your mobile marketing should reflect the context of your overall brand experience. For example, let’s say a customer is part of your loyalty program. Your app experience should speak to your customer in the context of his or her position in your loyalty program, just like you would in email, direct mail and other channels.

SMS Success Story: Bridgevine

Bridgevine, a reseller for cable and telecommunications companies, was challenged with prospective customers not following through with conversions – in this instance, calling in to the call center to schedule an installation appointment. So, the team decided to implement an automated email and SMS campaign with the goal of being more proactive.

Bridgevine placed a short form including both email address and mobile number on its Time Warner microsite. If a prospect completes the form and opts in to receive future

communications, but doesn’t immediately schedule an appointment, the individual is automatically placed into an automated re-touch program.

In this program, the lead receives an automated SMS and email – both triggered via the IBM Marketing Cloud digital marketing platform – upon submission of the form. The first SMS is delivered within one or two minutes of the form submission. The lead continues to receive automated SMS and email messages for up to three days, unless it becomes a conversion before then. If the prospect in the program calls to schedule an

installation appointment, the IBM Marketing Cloud platform is tied to Bridgevine’s call center via an API, therefore automatically removing the prospect from the program.

The program has resulted in a 300 percent increase in conversions, with a call-back rate of 33 percent. More than 30 percent of the prospects who provided their email addresses also opted in to the SMS program.



5 Use analytics and metrics to enhance your planning and evaluation.

Designing mobile experiences that drive deep levels of loyalty and advocacy will typically require you to fine-tune your programs based on analytical data and performance metrics. These analytics can be critical to understanding history, trends, preferences, and customer behaviors. Today, the best solutions automatically generate and recommend visualizations that help you quickly spot customer buying and behavior trends and untapped campaign opportunities.

These analytics advances include real-time insights into both the most profitable customer journeys and the pitfalls that result in abandoned shopping carts and stumbling blocks that lose customers. They can also reveal patterns that can be used to trigger communications and content for communications via other channels (and vice versa). In short, analytics can provide a unique view into how mobile push and SMS are impacting your overall marketing efforts, when they are most effective, and where you might want to look at incorporating them.

Reporting tools can help you further tweak your mobile efforts. They might, for example, confirm your assumptions about the percentage of customers opening your emails on mobile devices – or they might reveal new insights. A steep drop-off in smartphone conversion rates might, for example, signal that you need to simplify and streamline the purchase process.

Remember to review both “process” metrics (opens, clicks, opt-outs, etc.) and “output” metrics (conversions, redemptions, revenue, cost savings, etc.) to gain a fuller picture of your mobile program’s success. For example, did your mobile cart abandonment push campaign drive actual purchases beyond the clicks it generated? Similarly, did the SMS service notification system you put in place actually decrease missed appointments and increase customer satisfaction?

Because mobile tools and technologies are newer than Web and email, many marketers aren’t taking full advantage of the related analytics and reporting capabilities to elevate their programs. Make it a point to learn more about the capabilities in these areas and how they can inform your mobile efforts.



Section 2: Tools and Tactics for Mobile Engagement

Once you've taken more time to think about your mobile strategy, you can begin taking a closer look at the various tools and tactics you can employ to build stronger connections with your on-the-go customers and prospects. Here are five tools – plus related tactics and use cases – to help you drive stronger mobile engagement.

1 Mobile Email

Checking emails remains one of the most common uses of smartphones and tablets, with more than 50 percent of emails now opened on mobile devices.⁹ So in addition to being relevant and personalized, your emails need to be easy to view and navigate regardless of the device used to read them.

To that end, make sure you're using responsive design techniques that simplify your email with fewer offers, bigger icons and call-to-action buttons, larger images and fonts, and sizzling copy. Other variables to consider when building your emails include viewing context, mobility, product selection, and purchase and payment processes.

Your Mobile Email Best Practices List:

- Optimize emails for small form factors. **Front-load subject lines** and position larger calls to action and branding as high as possible to provide a user-friendly experience.
- **Design your email in sections or chunks** so that when a reader scrolls through your email, each scroll stop lines up easily for a fat-finger click.
- Add an email message to your onboarding program **asking new customers to register accounts and/or payment information.** This makes shopping by smartphone as close to a one-click experience as possible.
- **Make your emails more memorable.** If you want your mobile customers to retain your emails in their inbox until they're ready to act, you've got to deliver engaging messages that give them a reason to come back, click and convert.
- **Add a "Remind me later" button** that asks for the shopper's email address and triggers an email with product information and a link back to the product page. Send a soft, service-oriented reminder email to those who haven't clicked or converted in a set time.
- If you have a mobile app, **have your email links open content in the app** where appropriate. Make sure your site redirects to your mobile or responsive website. Use coordinated reminders and remarketing messages via SMS and push notifications based on behavior.

Multichannel Use Case

A major plumbing wholesale distributor hosts more than 90 events annually and uses its new rewards program to enrich the experience for both its customers and vendors. It moved from a one-email-per-event approach to a segmented series of mobile-friendly messages before, during and after the events, as well as an optimized on-site event registration process powered through its app, where customers receive exclusive coupons only redeemable for a certain amount of time.

Fast Fact

According to IBM research, mobile email clicks were up

22.8%
on Black Friday 2015
compared to 2014.³



2 Mobile App Push Notifications

Your customers are increasingly relying on apps for quick and easy interactions with businesses. Research suggests that in 2020, consumers will spend more than \$101 billion dollars on mobile apps via app stores, while global mobile app revenues are expected to grow to \$76.5 billion in 2017.¹⁰

Having a mobile app with limited functionality and integration is unlikely to help you drive marketing success, though. You'll want a cloud-based marketing platform that enables you to connect your mobile app and capture real-time insights and create personalized mobile experiences for each customer interaction – driving higher app engagement, increased brand recognition and revenue growth.

In addition, you'll want to think carefully about the goals of your mobile app. Do you want users to engage with your content, make a purchase, or something else? Answering these questions will help you determine your overall strategy.

Your Mobile Push Best Practices List

- **Tie mobile data to your users' profiles** to see who they are and how they've used your app.
- **Leverage app interest data, app interactions, and even average order value** to feed automatically into the cloud for a more robust view of your on-the-go audience.

- Achieve a truly **closed-loop marketing strategy across all channels** by integrating push campaign response information and in-app behaviors with other channel interactions and customer data.
- **Send visually rich push notifications** with video support to enhance the experience.
- Increase profit margins with **targeted marketing actions** like “quick click to purchase” or “set a reminder to buy.”
- Send targeted, engaging push notification campaigns that **leverage each customer's unique profile data from all channels**, not just mobile.
- Create multi-step and cross-channel automated programs and campaigns for customers at **each stage of the application lifecycle**.

Multichannel Use Case

A leading insurance company delivers a responsive experience to keep policyholders satisfied. Full business transactions are enabled 24 hours a day, seven days a week from anywhere in the world.

For example, mobile provides a wealth of opportunities for insurers to file claims in the app at the time of the incident. Once they have submitted their claims, insurers receive an email with instructions on next steps. During this process the company encourages customers to use its app

to schedule an appointment with a claim examiner in its offices or via personalized live video chat.

On the day of the appointment, based on user preferences, the customer receives an SMS reminder or a push notification that offers the option to accept, reschedule, visit a FAQ page or dismiss. Customers are satisfied with how easy the process is and are happy to share that service experience with their social networks.

Mobile Push Usage Ideas by Vertical



Retail – Send discount coupons, new arrival information, daily deals and abandoned shopping cart messages



Airlines – Send flight status updates and check-in alerts



Hotels – Send check-in alerts, welcome messages and special event information; drive ancillary service revenue on premise



Sports and Cultural Venues – Send special event coupons and discounts



Banking and Financial Services – Send transaction alerts and special offers

3 SMS Messaging

With better than 90 percent open rates on SMS and engagement rates of up to eight times higher than email, SMS is the tried and true workhorse of mobile marketing.¹¹ In fact, text messages are read on average within five seconds.¹²

However, incorporating SMS into your marketing communications can be challenging for resource-limited marketing teams. An integrated, cloud-based marketing platform enables marketers to more easily tap into the SMS channel and deliver on the promise of multichannel marketing.

If you're just getting started, remember to keep your SMS messages short, sweet and simple. Given the 160-character limit of most carriers, a good general rule of thumb is that the faster you get to the meat of your message, the better. Offer easy instructions on what you want the recipient to do and communicate offer expiration dates if applicable.

Whether your goals are to drive revenue, reduce costs, or communicate quickly with loyal customers, SMS messaging can help you meet your objectives.

Your SMS Best Practices List:

- **Promote SMS opt-in across key touch points**, including email, POS signs, ads throughout stores or in mall locations, or on transaction receipts.
- **Create exclusive content for SMS** rather than regurgitating offers you're communicating through other channels.
- As applicable, **build basic SMS programs** like Text to Join, Text for Info, Text to Vote, Text to Screen, or Text to Win.
- **Engage in a two-way dialogue** with customers via interactive campaigns designed to look for specific keywords and respond intelligently.
- Look for ways to **integrate SMS into your existing automated campaigns** to drive stronger response.
- Send transactional SMS or SMS reminders by **leveraging APIs** to allow messages to be sent from your own infrastructure.
- Review and analyze aggregate SMS campaign data and **use this data to drive more relevant content** in both SMS and other channels.

Multichannel Use Case

A national retailer understood two key things about its clients: They love their mobile phones, and they love a bargain. With that in mind, it used SMS mobile messaging to offer promotions, discounts and introductions to new fashions.

Its SMS opt-in effort included traditional emails, in-store signage, and web sign-up links. The campaign was so engaging for customers that the company reported the mobile text messages generated a 97 percent open rate, with 71 percent of users accessing deals from their smartphone.

SMS Usage Ideas by Industry

 **Retail** – Text alerts and promotions, coupons, sale events, birthday specials or free online shipping notifications

 **Travel** – Critical flight status updates, special offers, contests/sweepstakes, last-minute deals

 **Banking and Financial Services** – Policy expiration notices, PIN verification code requests, account alerts, bill payments, fraud/transaction alerts, thank you messages, missed payments

 **Services** – Reminders, appointment confirmations, outage notifications, customer service updates or “request a call back” notices

 **Consumer Goods** – Contests and sweepstakes, tips / information, recipes, coupons, loyalty programs, inventory updates

4 Social Media

In today's landscape, there's a good chance your customers are consuming social content on mobile devices. According to one study, 91 percent of smartphone owners ages 18 to 29 used social networking on their phone, while 55 percent of those 50 and older had done so.¹³ Furthermore, integrating social media channels with your mobile marketing can give you the power to turn social insights into action by creating cross-platform dialogues, building stronger advocacy and improving loyalty.

If you want your social content to be tantalizing and shareable on mobile, think about your offer on a smartphone, where brevity is a must. Scrutinize every word, photo, graphic and offer. Is your text short enough, but still clear? If you were the customer, would the image draw you in regardless of the device? Does the graphic and copy work together to maximize the space?

Whether it's optimizing your content so it will look good on all devices or implementing new ways to create a stronger experience across social, SMS and mobile apps, savvy marketers will implement future social tactics with an eye on the mobile experience.

Your Social Media Best Practices List:

- Connect your social media engagement and publishing platform to your systems of record, enabling you to track the social behavior of leads that interact with your brand and **use these insights in cross-channel digital marketing campaigns.**
- Use social media brand pages and feeds to **drive SMS opt-ins and mobile app downloads.**
- **Offer a social-sign option** when contacts are registering/logging in, which reduces the friction on mobile devices.
- **Employ social look-alike modeling** to find new high-value prospects and advertise your mobile app and SMS programs to them, in addition to driving email opt-ins.
- Look for mobile-friendly social tools, **such as Twitter Lead Generation Forms**, which bring up a form already populated with the user's social account data (name, email address, Twitter handle, etc.).
- Communicate social promotions **in the in-app inbox** of your app downloaders.
- **Integrate social and mobile efforts** into one coordinated, multichannel marketing effort.

Multichannel Use Case

A renowned museum collects social behavior and analyzes sentiment to learn about their audiences. As its prospects share items or articles on Twitter, the museum reacts with direct messages on Twitter presenting related offers or special messages. This social interaction links to a museum mobile Web page where visitors can browse its collection.

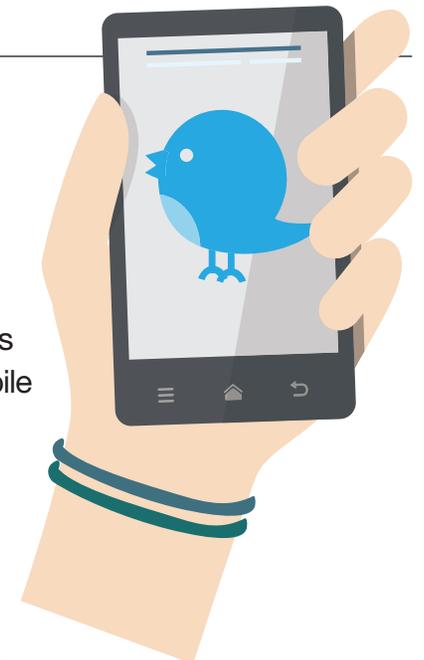
When the user abandons or logs off without completing a transaction, the museum continues to display ads on Facebook inviting the audience back to the online design shop or presenting exclusive offers to bring them to the museum.

Fast Fact

More than

80%

of Twitter users access the site through a mobile device.¹⁴



5 Location

Location-based solutions are the latest disrupter in mobile marketing and present exciting opportunities to connect with customers on the go, based on their physical location and preferences. In addition, location metrics data can provide intriguing insights into customer behaviors such as the number of times a customer visits your location, the amount of time spent, the zones visited, and more.

This data can help take your engagement to the next level, fueling specific offers at precise moments of interaction such as:

- **Location segments:** Send messages based on user's last known locations.
- **Arrival / departure-event based message:** Drive relevance with content specifically crafted to address the customer experience at these key moments.
- **Indoor messaging:** Use beacons and similar tools to create timely messages as customers walk in the door and engage with in-store products.

The ability to leverage location to provide on-the-go, in-context information represents a true convergence of the digital and physical worlds, and opens up new possibilities from that first touch all the way through the customer journey into post-purchase and loyalty.

Your Location Marketing Best Practices List:

- When asking for push notification and location permissions, **clearly explain the opt-in benefits** and provide context about the communications you'll be providing.
- **Use tools such as GPS and geofencing** – with the proper permissions – to locate potential prospects.
- Provide helpful information, offers or entertainment to customers **based on their geographic location.**
- To avoid overwhelming or annoying users, **consider frequency-based rules** that limit the content you push to an individual during a specific time frame.
- **Use location-based data to monitor dwell time**, understand traffic patterns and gain insights on how customers react in different places.
- Leverage mobile location data to **trigger personalized content** via mobile push and SMS.
- Use on-location data to **drive relevance via interactions in other key messaging channels**, such as email and in-app notifications.

Multichannel Use Case

A leading sports team uses mobile app push to deliver game-day promotions based on a fan's location. It sends promotional push notifications when app users are near key sports venues, and the fans are prompted to participate on game day. This messaging increases fan engagement and helps supplement the team's CRM database for further outreach.

A few days after the game, the team sends an email with information on upcoming sports events and promotions based on that user's actions in the mobile app.

Location Marketing Usage Examples by Industry



Retail: Understand in-venue behaviors and engage customers with location-related content



Travel: Optimize the distribution of airport personnel; use mobile apps and beacons for hotel keyless check-in process



Supply Chain: Optimize flow and distribution from bottler to ultimate destination (vending machine, store, etc.) leveraging the context of location



Federal: Apply the appropriate level of security clearance based on location & building/room properties



Healthcare: Track movable assets to improve customer care

Conclusion

With more than half of smartphone users checking their devices several times an hour, most businesses can assume their customers are just about almost always “plugged in.”¹⁵ They can also assume that regardless of the channel, device and context in which a customer or prospect interaction takes place, that contact expects a seamless, relevant experience.

For the typical marketer, this type of cross-channel personalization can seem daunting. Fortunately, all the mobile interactions taking place every second are creating a mountain of data. In this landscape, effective mobile marketing engagement involves harnessing the combination of devices, channels, data and behaviors and using it to connect more strongly with your customers.

To that end, take the time to understand the mobile buying journey and build a thoughtful strategy focused on enhancing this customer experience. By doing so, you’ll be well-positioned to take advantage of the tools and technologies available today to capture mobile behaviors and use them to drive smart, contextual marketing campaigns that nurture prospects more effectively, drive increased revenue and build greater loyalty.

Footnotes

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Additional Resources

- 1) Tip Sheet: “[7 Tips for Getting Started with Mobile App Push Notifications](#)”
- 2) Webinar: “[Mobile Use Cases to Inspire Your Omnichannel Marketing Efforts](#)”
- 3) Tip Sheet: “[7 Tips for Incorporating SMS into Your Digital Marketing Efforts](#)”
- 4) Webinar: “[Why Everything You Thought You Knew About Mobile Marketing Is About to Change](#)”
- 5) Tip Sheet: “[7 Tips for Using Email to Drive Mobile Engagement – and Vice-Versa](#)”

About IBM Marketing Cloud

IBM Marketing Cloud, part of the IBM Marketing Solutions portfolio, powers the delivery of exceptional experiences for customers across the buyer journey by leveraging customer data and behaviors, providing analytical insights and automating relevant cross-channel interactions. The cloud-based digital marketing platform provides email marketing, lead management and mobile engagement functionality to inform and drive personalized interactions in real time. To find out more, please contact us at 1-866-745-8767 or +44 20 7202 5930 and visit ibmmarketingcloud.com/contact.

