SALESFORCE MESSAGING

SMART BUYER'S GUIDE

Right Questions to Ask
5

Helping you buy the
right messaging app on
Salesforce for years
of growth

SIDDHARTH SEHGAL

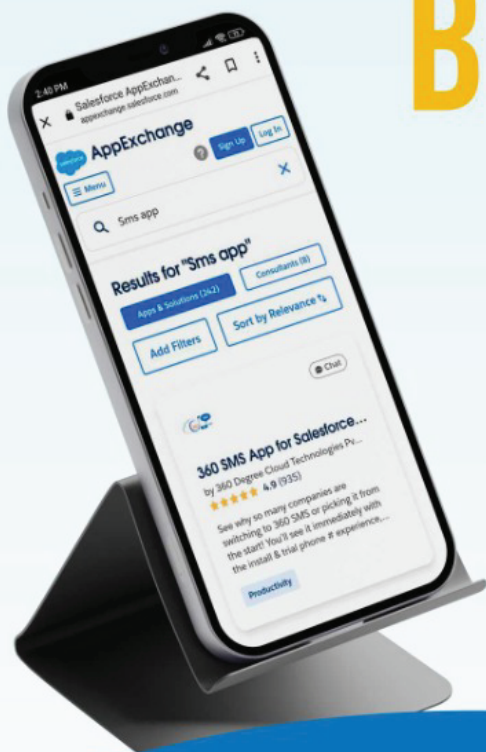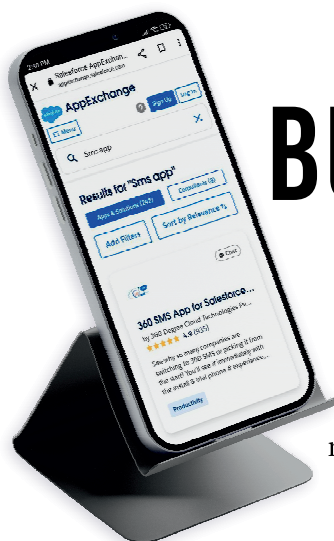Creator of Communication 4.2 Framework

SALESFORCE MESSAGING SMART BUYER'S GUIDE

Helping you buy the right messaging app on Salesforce for years of growth

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Creator of Communication 4.2 Framework

Would you like to learn from others' mistakes and buy the right SMS App for Salesforce for the first time? Or perhaps you are looking to upgrade your current Texting App.

Nothing is more frustrating to a buyer than when everyone claims to be the best and comes up with new technical jargon.

"Which App should I get?" "Which features are must-haves?" "Why does the App need to be native to Salesforce?" "Do I need other channels like MMS, WhatsApp, Line, Ringless Voicemail, etc.?"

The goal of this in-depth guide to the most suitable SMS App on Salesforce is to help you fully understand the type of SMS Solution you need to fit your demands so that, in the end, you are thrilled with your choice.

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ABOUT ME, SID – A 'HUMBLEBRAG'

As a seasoned expert in Salesforce consulting, I have been dedicated to driving business success through the Salesforce platform for over 15 years. My extensive experience and knowledge in the field have earned me recognition, including an award for my contribution to the industry.

Additionally, I have authored a popular book, "Cracking the SMS Conversion Code," which showcases my expertise and insights into the world of Text messaging and has proved to be immensely useful for businesses.

My goal 'of' writing this book is to help businesses make informed decisions when selecting a messaging App on Salesforce.

I want to empower you with the knowledge and tools to make the right choice for your business and ensure its rapid growth with minimal investment.

With my guidance, you will be able to understand the power of Text messaging and will be fully equipped to buy the best messaging App on Salesforce.

You will ask the right set of questions and weed out the apps that will become growth blockers within 'two' months of implementation.

WHAT ARE THE STAKES?

What happens if you select the wrong messaging App?

The standard knee-jerk response when a business realizes it needs to send messages, is that it jumps at the first standalone application it sees.

While the intention is laudable, **the action is misinformed.** They forget completely about tapping into the goldmine that is their CRM.

A standalone 'App,' at best, has basic integrations to CRM data to window-dress itself. And that's if they're even able to integrate into CRMs like Salesforce.

It's a useless wolf in sheep's clothing. **These aren't embedded in Salesforce, are not fully featured, and can be severely limiting for even basic operations.**

Put your faith in an App so shaky; it'll be the biggest bottleneck to your growth in a few months.

Don't be Steve ☺

Steve, the owner of a small real estate agency, was looking for ways to increase his business and reach a wider audience. He heard that Texting was the next big thing in communication and decided to invest in a Texting App for his business. Steve went ahead and bought the first Texting App he found without much research.

However, things took a turn for the worse. The App was not user-friendly, and his team found it challenging to navigate. They also faced frequent technical glitches and had to spend hours on hold waiting for support. The App was also not compliant with industry regulations, putting Steve's business at risk of lawsuits.

The low-quality Texting App was a burden for Steve's business, and it 'cost' him more in terms of time, money, and resources to fix the issues.

Steve realized he should have done more research before investing in a Texting App.

To drive home the gravity of this decision, allow me to enumerate what's really at stake here:

Wasted Effort

Poor integration with your Salesforce can take hours, even days, to accomplish tasks that would otherwise take minutes. In addition, sales teams may need to manually enter customer data into both systems, leading to errors, inefficiencies, and duplicated effort.

Using 2 systems by the 'sales' team will result in the creation of data silos as data may not be properly transferred to Salesforce, creating separate silos of data that cannot be easily accessed or used by the sales team.

The sales team may even need to manually enter customer data into both systems, leading to errors, inefficiencies, and duplicated effort.

Adaptability

Your agents and marketing admins will be swiveling and switching between systems all day long just to enter data manually, all while introducing human errors.

Log in to one system to send an SMS and another to update the deal 'status - you're' already asking too much.

Teams need everything in a single, productive, and navigable 360-degree view. They like to be able to see all their conversations with a customer across different channels in a unified chat window.

Scalability

Most standalone applications are built for small businesses or teams of 3-5 and can't be used parallelly by Sales, Marketing, and Service teams.

With these apps, teams can't even scale messaging volume as the company grows, use bulk messaging (from 2 to 2 million simultaneous outgoing messages), send one-on-one messages (peer-to-peer messages), or set up automated messages with just one button click.

If setting up any kind of message or interaction takes more than 2 minutes, you've already lost scale, and the App isn't worth proceeding with.

Mr. Brian from a well-known Non-Profit Organization was using a solution that could let 'him' send only 200 messages at a time.

Once, they had to send 70K messages in one go during an emergency notification, and it was a nightmare. The admin spent hours sending those messages, and the project was a magnificent failure.

Data Security

You might come across quite a few apps that claim to be native to Salesforce but aren't truly native. You can only be certain that an 'App' is Salesforce-native if the App has no servers and doesn't integrate with any third-party 'CRMs.'

It's also common to see apps that don't practice access-hardening, i.e., they have backdoor access to your systems, which lets them see all your data and activity. **They've dubbed this as 'remote access,'** and trust 'me, it's' a can of worms you're better off without.

True Dialog customers understood it the hard way when all their and their client's data was leaked with the complete message details. The leaked data had millions of records and was easily available.

You can read about this in more detail on https://www.vpnmentor. com/blog/report-truedialog-leak/

Maintainability

While 99% of companies don't have amazing product support, a lot of them don't give you dedicated account managers either. **And when they do provide support, it burns an unplanned hole in your budget.**

Worse, if the App is just poorly strung together, you'd end up spending hours in maintenance to even use most app features to their full potential.

A good way to steer clear of such a high-maintenance app is to look at AppExchange reviews. Even a passing glance at 20 or so reviews should tell you if customers are being stone-walled by support or living a maintenance nightmare.

If you rush in selecting an App, then be prepared to pay $200/hour for many weeks or months of effort. **Everything which you assumed was part of the App suddenly becomes part of the Out of Scope Project.** Now you are paying them so they can remove bugs from their product.

Compliance

As countries grapple with the still-nascent challenges of data privacy and governance, you will have regulatory bodies popping up in different countries that come up with their own codes of conduct and regulations.

Each regulation is different, almost competing with the others, and has its own set of requirements.

With regulations, you can definitely expect them to be fickle and that they'll never play nice to each other.

An excellent way to safeguard your communications is to choose an SMS solution that lets you set up user-defined Opt-in and Opt-out preferences with just a few clicks. The solution also is GDPR, CAN-SPAM, TCPA, and HIPAA compliant.

If this isn't functioning and available to you out of the box, the solution isn't even worth considering.

The Bigger Picture: The Importance of a True Texting App for Your Business.

The current scenario is very scary - everyone has a product to sell. They don't have any idea of how Texting actually works in any specific industry, whereas the buyer is looking at the solution from a very myopic view of just sending a Text message. The bigger, unmet need of buying an SMS app i.e., relationship building, is left behind.

The solution to this bigger problem is an application that can do everything in an automated fashion. One that can automate all of your use cases and does not require any manual intervention.

A 'true' Texting App will increase your lead conversion percentage by 4X, accelerate your sales cycles by 2X, and get you more sales and repeat orders.

Read on to learn how to select a solution that will actually work for you and how not to fall into those shiny one-time-wonder solutions which will work the first time, only for the whole world to then come crashing.

Do take your decision post reading this book and save yourself a world of pain, because if you buy, it will be very difficult to jump from the ship. **You will be stuck and will have to compromise with a modest 20% growth, whereas you could have grown by 4X.**

UNCOVER THE SECRETS OF 'SMS' APP SELECTION IN SALESFORCE

Cost is actually the last criterion to make a decision; many times, clients start with 'it' first and make it the only criterion.

A bad solution costs way more in opportunity.

For instance, to position themselves as the cheapest solution, some Apps use backend systems that are not secure and are highly inefficient.

You can fix this by asking the right set of Questions.

All you need to ask are 5 Questions before buying a Salesforce Texting Solution:

1) Are they native to Salesforce?

2) Do they provide Texting Messaging compliance?

3) Do they have out-of-box features, and how much maintenance do they require?

4) Are they Innovative? Which features do they have that no one has?

5) How good is their customer service?

Let's cover each one of them in greater detail.

QUESTION 1: Are they NATIVE TO SALESFORCE?

On the face of it, this question does not hold any value. You may ask, "How does it matter to me what technology they use in the backend?" But trust me, this is the most important question and hence the 1st one.

> I remember the case of Sam, who bought a cheap application and then sent a message to his customers in the morning at 9:00 AM while sipping tea that read, "Today's gold rate is $1700/Ounce." The message got delivered at 8:00 PM to his customers when he was having dinner, and the rate had actually increased to $1770/Ounce.

What's the use of these kinds of messages?

If the solution is built on anything other than Salesforce, then it's a big RED Flag.

This means that the solution is integrated with Salesforce but is not 'native' to it.

It's like ordering food every day from a restaurant instead of cooking in your kitchen. You are full in the short term, but in the long term, the effects are horrible. It's the same when you buy a solution built on other languages like Java and ASP.net.

These are just integrating with your Salesforce and don't provide advanced productivity features, as their heart lies outside the Salesforce ecosystem.

They just have hacky or basic integrations to work with Salesforce.com, **and in most cases, your reps still have to use two systems – a big wastage of their time.**

To ensure the App is 100% native to Salesforce, ask the App makers this: **"Do you only work with Salesforce CRM or integrate with other CRMs as well?"**

If the answer to this is **YES,** then it's time to say **Good Bye.**

Because what this means is the application code is built in some languages like Node JS, Java, or ASP.net, and the App maker is just integrating with Salesforce and extending the App's features by an API connection.

Moreover, from a security point of view, they have a server on which all your data resides. So, if tomorrow anything happens to this server, then your application will be down too.

And God forbid, if that server is hacked, then your complete data will be on the Dark web in minutes.

A Nightmare for any Company to manage.

When the application is built on Salesforce, then there is no server at all.

If there is no server, then there is no chance of data getting stolen. In this case, Salesforce acts as your server and stores all the information. No one, i.e., even the CEO of the SMS company, can see your data.

> **Around ten million text messages were exposed by an unprotected database run by an American-based communications company, TrueDialog.**
>
> The database exposed millions of user's data, including text messages, names, addresses, and other private information.
>
> True Dialog provides bulk SMS services to U.S.-based companies, colleges, and Universities.
>
> Reference:
>
> https://cisomag.eccouncil.org/
> truedialog-database-exposes-tens-of-millions-of-sms-data/

In a nutshell, a Native Messaging Application within the Salesforce platform offers several benefits, including:

Improved integration: A native SMS application is seamlessly integrated into the Salesforce platform, allowing for easy transfer of data and information between the two systems.

Enhanced user experience: A native SMS application provides a consistent and familiar user experience, reducing the learning curve for sales teams and improving overall adoption.

Increased productivity: A native SMS application can automate and streamline processes, such as follow-up reminders, to increase productivity and efficiency.

Better data security: A native SMS application benefits from the robust security measures of the Salesforce platform, ensuring the protection of sensitive customer data.

Customization: A native SMS application can be customized to meet the specific needs and requirements of your company.

Improved collaboration: A native SMS application supports collaboration and teamwork between sales teams and other departments, such as customer service and marketing.

Mobile accessibility: A native SMS application offers mobile access to support sales teams on the go.

THE WORLD'S SHORTEST SECURITY REVIEW

In 2021, I met John Harrow, a legal compliance manager who evaluated vendors for a Fortune 500 firm. He had a reputation for thoroughness.

He'd come to review the 360 SMS 'App' I had and to ensure that all bases were covered from a legal security point of view. To this end, he asked me a barrage of questions about data storage concerns and on-site servers.

I wish I could tell you how wide he smiled (almost breaking into laughter, only to hold it in due to his reputation) when I told him we had no servers of our own and everything was stored only on Salesforce.

"Man, that's something," said John.

"This has to be the easiest security review of my life.

You have no servers, which is great.
And Salesforce is already cleared by us as a vendor.

I think I'll just call it a day then."

Question 2: Do they provide TEXT MESSAGING COMPLIANCE?

Never take compliance lightly.

> *Papa Johns* did, and they were slammed with a $250M Class Level action lawsuit. The final settlement was for $16.5M.

Always discuss compliance in detail with your vendor.

Ask the questions below to get clarity on whether they will fulfill your compliance needs. ***Never ever think this is not for you.***

Laws are getting stricter by the day, and you need to be compliant *always.*

Now the beauty of the question "Does your app support Compliance?" to any SMS App Vendor is that the answer is always "YES."

So, it would be best if you went deeper and probed with the right questions, and you will be surprised to find that the emphatic "YES" was actually superficial. The system does not even work for you.

A system supports complete SMS compliance when it gives you the below-listed essential features. **Understand each one of them and then ask the vendor if they support that particular compliance feature.**

1) **Opt-In Compliance:**

   Under this compliance, no Messages are to go out if the person has not 'Opted In' explicitly, i.e., start with the assumption that anyone in our database is not Opted In to receive SMS, and when they will Opt In, *only then* will SMS conversation get sent.

   Any advanced Opt-In compliance will let you also create an *Exception Template,* as there should be an ability for your admin to send these exception templates to customers, not Opted In, asking them to Opt In.

   Sending a message to ask for Opt-In is also ILLEGAL. You can land fines between $500-$1500 for each infraction.

2) **Opt-Out Compliance:**

   In this scenario, recipients are assumed to be 'Opted In.' Once a recipient says 'Stop,' 'Unsubscribe,' 'Opt-Out,' or any other keyword reserved for Opt-Out, then the person shall be automatically Opted Out of all future messages.

The reps should not be able to send any manual messages thereafter, and all the automated messages or previously scheduled messages should automatically be stopped. The date and time of the Opt-Out should be stored for future compliance reporting purposes.

3) **AI Based Opt-Out, Opt-In Compliance:**

Keyword-based Opt-Out is very common, but the world is moving towards AI-based compliance, i.e., the system should be super intelligent to even identify phrases like

"If I get another message, then I will see you in court."

"Don't bother me again."

"Please STOP"

"I never signed up for your services."

"Take me Off your list."

as Opt-Out messages and mark them in Salesforce automatically. Compliance should not depend on Sales Reps marking the messages manually as Opt-Out.

The same saves time and ensures no messages go out once someone does not want to be contacted.

> Mr. Steve learned it the hard way. He believed his team would take care of it, but the Sales Representative was on leave. No one checked the Opt-Out message, and they kept sending them Sales related messages. No prizes for guessing; an attorney letter came knocking at their doorstep in a couple of days.

4) Department or 'Number-wise' Opt-Out Compliance:

An SMS app should provide the ability to Opt-Out entire 'departments, i.e. if' you use the same number for Sales, Marketing, and Accounting, then the customer can Opt-Out from Sales and Marketing messages but can't Opt-Out from essential accounting messages.

Also, everything should be automated to ensure compliance in a way that when a department or set of people is opted out, they can't send the messages until the client opts back In or 'Resubscribes.'

In some advanced cases, the companies have a requirement to Opt-Out clients from specific numbers but still send messages from other numbers.

Ensure you think and talk over all of these 4 requirements with your vendor.

Failing to follow these regulations can result in legal and financial consequences, such as fines, lawsuits, and damage to the company's reputation.

COMPLIANCE COMES IN ALL SHAPES AND SIZES

I remember speaking to Catherine, a Salesforce Admin at a Financial Services firm, about a peculiar problem with Opt-Outs.

She wanted her customers to be able to opt-out of bulk messages that they might find annoying or irrelevant, but not the one-on-one (peer-to-peer) messages that they sent out, which were important and took significant skilled hours.

Luckily, the App we gave her could handle selective Opt-Outs as well as any other user-defined criteria for Opt-Outs.

Compliance comes in all shapes and only evolves over time, though only a few apps out there have compliance...first architecture by design.

Your App should be able to adapt fast and take on whatever new international regulations are thrown at it.

Choose the wrong App, and you might be stuck with a pricey messaging subscription but no compliance controls to use it. You'll be stuck changing providers over and over every time a new regulation kicks in (which is quite frequent these days).

I'm proud to say that the 360 SMS App stands out with its exceptional compliance, making it the ideal choice for businesses seeking a secure and reliable Texting solution for their Salesforce platform.

Question 3: Do they have OUT-OF-THE-BOX FEATURES, and how much maintenance do they require?

The answer to this question will ensure that you don't end up stuck with a half-baked solution and just paying more to a Salesforce consulting team at the end of it all to have those capabilities extended or maintained.

The App you select should have everything available as *out-for-the-box* features and no features which need to be developed, customized, or maintained for you.

The Top 3 Out of the Box Features out of many are:

1) **Support all Clouds:** This feature ensures you invest in only one App and do not need to buy a different app for each separate department like Sales, Service, or Marketing.

2) **Automated Workflows:** This feature enables companies to automate routine tasks, such as sending SMS messages to customers, based on triggers or events in Salesforce.

3) **SMS Reporting:** This feature provides data and insights into the performance of SMS campaigns, including the number of messages sent, response rates, and conversion rates.

The App must work with all clouds - Sales, Service, Experience, and Marketing Cloud. It should also have the ability to support non-Salesforce users.

A superb advantage of using 1 app for everything is that your employees don't need to keep jumping from one application to another. The transition from one department to another is very easy.

For example, say your marketing manager sends a message to 50,000 prospects from the Marketing Cloud, and 1000 prospects reply that they are interested. The Marketing team has done its job of evoking interest, but now what? They are now stuck with these 1000 replies coming in at different times as the sales team is not in the Marketing Cloud. This is where deals start getting lost.

Now if the same App was also working in the Sales Cloud, then the replies would have gone directly into the Sales Cloud and tagged to the proper Sales rep who was leading those prospects. They will only see their prospects based on the replies and will start the conversation from the Sales Cloud itself.

> An amazing experience for the Marketing Admin.
>
> I still remember the Marketing admin dancing when I told him we have this feature in the 360 SMS App.
>
> He told us that, finally, there is someone who thought about them, and that's what differentiates us.

Don't forget your key stakeholders, i.e., customers and partners. Why not let them use the power of Texting? Just ensure the App you pick works on the Experience Cloud. Your distributors and volunteers are more eager to use it than even your employees, and they will give you the most value out of it.

Your distributor is the one speaking with your customers. As of now, they use their personal phone to message, but you don't have any visibility or access to it.

Bring that visibility, and you will finally get a chance to train them or remind them for follow-ups. This small change will increase your business multifold. **Give them a chance, and you will be pleasantly surprised with the results.**

Salesforce users will use a Texting App; *what about non-Salesforce users?* Will you go and buy another solution for the rest of your company and not let them take advantage of this amazing solution?

Choose a company that has a standalone product also so that the other departments can enjoy the benefits of Texting.

We at 360 SMS App realized this pain very early and came up with a standalone product - Textolic.

Textolic sits in your Salesforce and utilizes your CRM data, so you don't have to buy Salesforce licenses for other departments or worry about loading data in another system and maintaining 2 systems.

The App should support all modes of automation, including Flows, Apex, and APIs.

This is critical for you to get the most out of your Salesforce investment and streamline the communication processes.

Flows are a powerful automation tool that can be used to send SMS messages to customers based on certain triggers or events within Salesforce. For example, a flow could be set up to automatically send a Text message to a customer when a new opportunity is created in Salesforce or when a case is closed. Flows are easy to set up and use, making them an ideal solution for everyone that wants to automate routine tasks and save time.

Apex is a Salesforce programmatic language that can be used to automate tasks and add custom functionality. With Apex, your developers can write custom code to send SMS messages to customers or even automate entire business processes. This is a more advanced solution that is best suited for companies that have a high level of technical expertise or that want to add custom functionality to Salesforce that is not available with out-of-the-box features.

APIs (Application Programming Interfaces) are another way that companies can automate SMS messages in Salesforce. APIs allow companies to integrate Salesforce with other systems, such as any legacy platforms, and send SMS messages to customers through those systems. This is a powerful solution for companies that want to leverage the data and insights they have in Salesforce to drive marketing and communication efforts.

The App should provide in-depth reporting that is easy to access and understand, giving you the insights needed to optimize your messaging strategies.

It's important to have access to detailed, real-time information about the messages you're sending and how customers are responding.

When evaluating reporting capabilities, you should look for features such as detailed message delivery and response reports, real-time message tracking, and the ability to segment and analyze data.

In addition, you should look for a Texting App that offers custom reporting options, allowing you to build reports that are tailored to their specific needs and goals. This can be especially useful when you want to track the effectiveness of your messaging campaigns or when you need to meet specific regulatory requirements for data reporting.

A robust reporting capability can help you better understand your customers and make more informed decisions about their messaging strategies.

Uncover the hidden costs of maintenance before it's too late

When selecting a messaging solution, it's important to keep maintenance costs and effort in mind. A solution that requires a lot of time and resources to maintain can drain your team and take away from other important tasks. That's why it's important to choose a solution that is easy to use, manage, and maintain.

Here are 3 steps you can take to identify the maintenance cost:

1) **Review the vendor's documentation:** Look for information on the solution's maintenance requirements, including how often updates are released and how easy it is to manage and maintain the solution.

2) **Ask the vendor questions:** Contact the vendor and ask about their maintenance process, including what types of support they offer and how often updates are released. You can also ask about any additional costs associated with maintenance, such as support or training.

3) **Check online reviews:** Look for online reviews on AppExchange of the solution from other customers to see if they mention any issues with maintenance costs.

Managing Maintenance Costs with the 360 SMS App

Mr. Alex, the Director of Sales in a Mortgage Company, was faced with unexpected costs during a software upgrade. His previous Texting solution provider charged him a high fee for the upgrade, and he felt like he was being held, hostage. The upgrade process was imperative for his sales team to continue communicating effectively with clients, but the costs were not in the budget.

Frustrated with the situation, Mr. Alex reached out to me. I conducted a thorough analysis of his current Texting system and found that many of the additional costs he was facing were due to the system's non-native nature.

Alex decided to choose the 360 SMS App and was able to enjoy a hassle-free upgrade process without incurring any hidden costs. The results of the switch to the 360 SMS App were significant. Not only did Alex save money on maintenance costs, but his sales team was also able to improve their communication and overall productivity.

Question 4: Are they INNOVATIVE, and which features are unique to them?

Choose a vendor who is the most innovative because innovation is the only currency that brings in growth. If you have to stay ahead of your competition, then you need to count on a company that innovates every month.

If they are not innovating, then you are investing in a solution that will stagnate your growth. They need to consistently bring in features that will make the team more productive and efficient.

3 key places to look for innovations in a Salesforce SMS App are:

1) **Drip Campaigns, aka Journey Builder:**

    A Drip Campaign is an automated capability that lets you send a series of Messages/Emails/Ringless Voicemails to your prospects and keep sending them out until they reply or eventually Opt-Out.

    A well-structured drip lets you set messages for the whole year and converts your cold prospects into warm prospects automatically. **The best part of a drip is that it takes 10 min to even create a 9-step drip spanning across the whole year, that too, without writing a single line of code.**

If to create a drip in an App, you don't have a dedicated UI, and you need to write automation, that is, PB, Flow, or Apex, then it's not the right solution for you.

The lack of a UI for Drips will cost you a lot of effort spent on creating and maintaining the drip. **If that's the case, the App's just automation that is being sold to you under the misleading name 'Drip Campaign.'** *Beware.*

2) **Decision Trees, aka SMS bot:**

Your solution should give you the ability to build Texting bots without writing a single line of code. It should all be 'out-of-the-box.'

For those who don't know decision trees, these are a set of questions followed by choices, and for each choice, you are asked new questions with its own choices, and so forth. This can go as deep as you require, and I have seen some successful ones going 'six' levels deep on average.

A decision tree adds tremendous value to your customers as they can get answers instantly without waiting for a rep to take over. Also, when you get all the details from the tree, you can easily move the conversation to a rep for further discussion.

e,g: SMS Chatbot aka iText in 360 SMS App.

3) **Multi-Channel Support:**

A robust application that supports multiple in-built channels without integration. And this is table stakes. It might be that today, you only need SMS. But tomorrow, when you expand, then you might need 'WhatsApp, Viber, FB Messenger, Instagram, Line, Telephony, RVM, or any other channel. It will be a nightmare to start looking for an App all over again after setting up processes in one or having multiple Apps, i.e., one App for each channel.

That's a nightmare if there ever was one.

Make life *simple*. Choose an App that has all channels already present.

Case-in-point: Ringless Voicemail (RVM).

RVM is an underutilized and game-changing channel. The prospect can be reached by RVM even when s(he) is not responding to your messages.

It's a non-intrusive yet *personal-feeling* channel and makes customer feels like they missed your call. When the recipients listen to a personal message, they react emotionally and call you back. As a marketer or Sales rep, your work is *done*.

You wanted to get hold of them? Now you've got them.

Another simple way to check for innovation is to see the number of releases in a year. Lower releases mean low/no innovation and a reactive approach to the industry.

It isn't cynical to say that a product that doesn't keep up with the industry is a powder keg for your processes.

Question 5: How Good is their CUSTOMER SERVICE?

Customer Service can make or break your business.

We all are human beings, and when we try something new, we need handholding - so that we can keep progressing forward. Now everyone says that they have amazing support, but *in reality, **only 2% provide support** that far exceeds expectations.*

Better safe than sorry, right? **Now then, how do you judge someone's claims of Customer Service: Just look at the AppExchange reviews.** *Real Reviews don't lie.*

Then, check out the number of reviews; If they are around 1000, then the ratings are believable, and you can take it up at face value. Anything below that, and you must read the reviews with poorer ratings and see how they were handled.

There are very few companies that work from the heart. All of them are working from the head. You don't want to get stuck in a chain of endless emails to close your ticket. Companies like that are uninterested in your success.

Demos are good indicators. The experience you get in demos is the best experience you will ever get. If things are too delayed over there, then you can be sure that support will be the same story.

It's also a red flag if the company is not opening all of the support channels for you. If they say you *need* to buy a premium support plan or *need* to pay $200 per hour for a support call, then it's time to look for another vendor.

Remember that the amount of support required will be directly proportional to the *Complexity* of the App. The App is to be used by Sales and Service team, and they are not as tech-savvy as you are. If they are not able to use it on their own, they require a lot of training and will be consistently raising issues.

Remember, you are paying money to *use* the App, not to keep it as a trophy.

Another way to understand the amount of support required will be to check their Salesforce Expertise by asking a simple question: "Did they build their own product, or they got it outsourced?". If they outsourced the development of the product, then they are not a solution for you as they don't understand the Salesforce space and are dependent on another company to guide them. The pretense of support quickly falls apart here.

This impacts you in multiple places:

If they don't build the product in-house, then *every feature you will request will come 'at a very high' cost* as they have to pay someone else to build it.

The *releases will be super slow* as the less they create, the less they have to pay.

They *will not be up to date with Salesforce releases,* and the solution will break one day for sure.

Anything you want to do with the solution which requires Salesforce knowledge or any place where your team is stuck will be a challenge, as you won't have anyone to help you out.

These guys are dependent on *someone else* and will not be able to help.

The last will be a quick glance at the employee count on LinkedIn. The company size plays a very important role.

My clients have come across companies that say they have the best Texting solution for Salesforce and will do everything. A close inspection of LinkedIn shows it's a two people company. Now, would you like to bet the future growth of your company to a 2-person company?

What kind of support will they be able to give?

How strong will their product be?

The companies to work with are between 500 to 1000 employees. They are not too small to go bankrupt and not so large that they move rigidly like an elephant.

The size of companies gives you an insight into what kind of service you are going to get.

From Frustration to Freedom:
Josh's Journey with the 360 SMS App

Josh is in the business of precious metals and wants to send a million messages every week to his customers.

However, he was frustrated with the level of support he received from his previous Texting solution. His shortcode was repeatedly getting banned, and it took days to get someone on the phone to help.

This was nothing new in his life as it was the same experience he had with the previous six Texting Apps.

Everyone promised a lot, but after getting the order, everyone fell short of delivering the promised level of support.

This was when Josh stumbled upon the 360 SMS App. With our robust support system and dedicated account manager, Josh finally found the solution he was looking for.

With the 360 SMS App, Josh no longer has to worry about his shortcode being banned.

The team is always eager to come on a call and provide the support he needs to send his messages seamlessly.

And the best part?

All of this comes with no additional cost.

We are proud to say that at the 360 SMS App, we love our customers even after the sale is complete. Our love does not evaporate once we have the money in our bank account.

BONUS QUESTION

Understand the Cost in Complete detail

While it's important to invest in a high-quality app that meets your specific needs, it's also important to ensure that the App fits within your budget and provides value for money.

When evaluating the cost of a Texting App, it's important to consider the following:

Initial costs: Consider the upfront cost of purchasing or subscribing to the App, including any setup or customization fees.

Ongoing costs: Consider the cost of using the App on an ongoing basis, including any subscription or usage fees.

Hidden costs: Look for any hidden costs, such as fees for additional features or support, that may impact the overall cost of the App.

Return on investment (ROI): Evaluate the potential return on investment that the App may provide, including increased productivity and efficiency, improved customer satisfaction, and increased sales.

By considering the cost of a Texting App in conjunction with other factors, such as scalability, adaptability, and user experience, you can ensure that you make a well-informed decision that provides the best value for your company.

The TRUTH LIES IN THE TESTIMONIALS

"The 360 SMS App is all that it promises and more. Having a first-hand experience of how it works was so great, and it exceeded our expectations. Its features simply won me over, especially the automatically triggered WhatsApp through Process Builder, the intelligent Text, and email reply to incoming texts, which sends SMS responses [through emails.] The App and the great support team have really made our experience with the Salesforce platform more exciting and productive."

~Tunji Alade
Sr. Salesforce Consultant at ROI20 Global
***

"It's so innovative that we've already seen a number of productive features and enhancements over a short period of time."

~Eduardo Dela Rosa
CRM Integration Analyst at ResMed Ltd
***

"We'd initially started with another SMS solution, but when we saw just how much custom code was needed [in Salesforce], our competency search narrowed down from 16 vendors to 6, and then to just one – 360 SMS."

~Lindsay Fairchild
Salesforce Administrator at BISK Education

I am sure that what I have shared will help you make an informed choice.

I have equipped you with the right knowledge to go into the market and do complete research based on these 5 key points.

- – Is it a Native Salesforce Solution?
- – Does it have advanced out-of-the-box features?
- – Is the solution compatible with all Clouds like Sales, Service, and Marketing?
- – Is the application constantly Innovating?
- – How good is their Customer Service?

But my worry is, do you have time to ask these questions? Or to do the research?

I am even more worried about you asking this set of questions and everyone saying YES to them. The same will take a lot of deep probing to see if they genuinely mean 'yes,' or if they are saying that just to get your account.

I genuinely don't want you to make a wrong decision and take on the risk of losing 4X of Revenue, which you could have achieved with the right Texting solution.

So, let me hold your hand and help you select the best Texting solution for your business growth. Since you have already read my book and want to take the right decision, I want to help you out.

Join my 1-on-1 session worth $490 for FREE to help you come to the right decision.

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Siddharth Sehgal
Founder:- 360 Degree Cloud, 360 SMS App & Sunrise HCM...
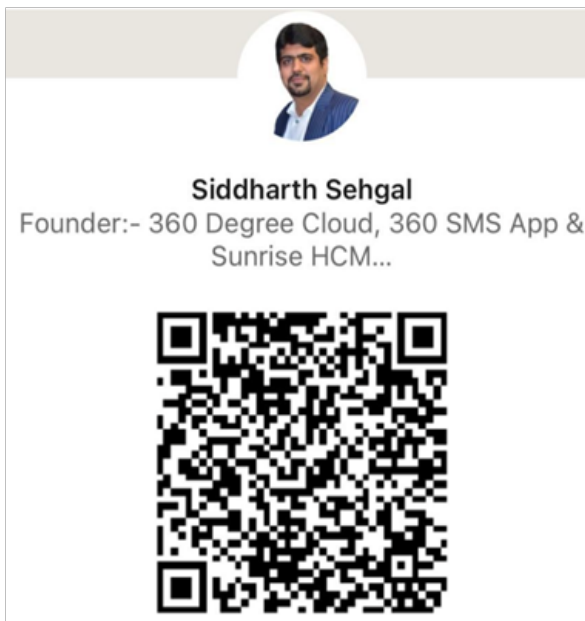
SALESFORCE MESSAGING
SMART BUYER'S GUIDE

Embark on an exciting adventure as you dive into the pages of "Salesforce Messaging Smart Buyer's Guide"— a guide that holds the key to selecting the perfect Texting app for Salesforce users. Imagine multiplying your lead conversion percentage by a staggering 4X, speeding up your sales cycles by 2X, and securing more sales and repeat orders. With this invaluable resource, you'll uncover the secrets to choosing an SMS app that's convenient and gets you truly excited about the results. Get ready to revolutionize your Salesforce experience and unlock the true power of texting.

Siddharth Sehgal

Introducing the revolutionary Communication 4.2 Framework, crafted by Siddharth Sehgal (Sid), to drive businesses towards exponential growth. Sid's vision is to transform customer connections and empower businesses to harness Salesforce's full potential. With a customer-centric approach and innovative strategies, he is reshaping the communication landscape. This ingenious framework enables businesses to build profound relationships with customers, ensuring unrivaled success in today's dynamic market.
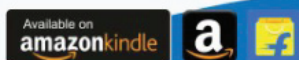
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