

Use Popular Third-Party Messaging Platforms For Customer Service

How To Borrow Moments To Serve Your Customers Where They Already Are

by Julie Ask and Ian Jacobs

January 20, 2021

Why Read This Report

Customer service organizations are adapting to increasingly social and connected consumers seeking service in their preferred channel. Consumers have embraced platforms like Apple Business Chat (ABC), Google's Business Messages, Messenger, and WhatsApp, but only a minority of brands offer service on these platforms, while a growing number are piloting service. Customer service leaders should read this report to learn why third-party platforms have evolved from nice-to-have to need-to-have in contact centers during the pandemic.

Key Takeaways

Explore Emerging Customer Service Channels To Meet Customers Wherever They Are

Customers expect quick, easy resolutions to their problems, regardless of the channel, platform, or device they're using. Customer service organizations must adapt to the new channels their customers increasingly prefer to use to meet their expectations of convenience.

When Call Wait Times Are Long, Customers Turn To Text-Based Channels

With the onset of the COVID-19 pandemic, overwhelmed contact centers have turned to asynchronous chat. In doing so, contact center agents are more efficient, and consumers report high satisfaction with resolution.

Contact Center Solutions Are Rapidly Integrating Third-Party Messaging Platforms ABC, Google's Business Messages, Messenger, and WhatsApp are leveraging ecosystem partners to embed themselves in both consumer workflows and contact centers.

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[The Case For Asynchronous Messaging: Apple Business Chat, Messenger, WhatsApp](#)

[SMS: Customer Service's Ultimate Workhorse](#)



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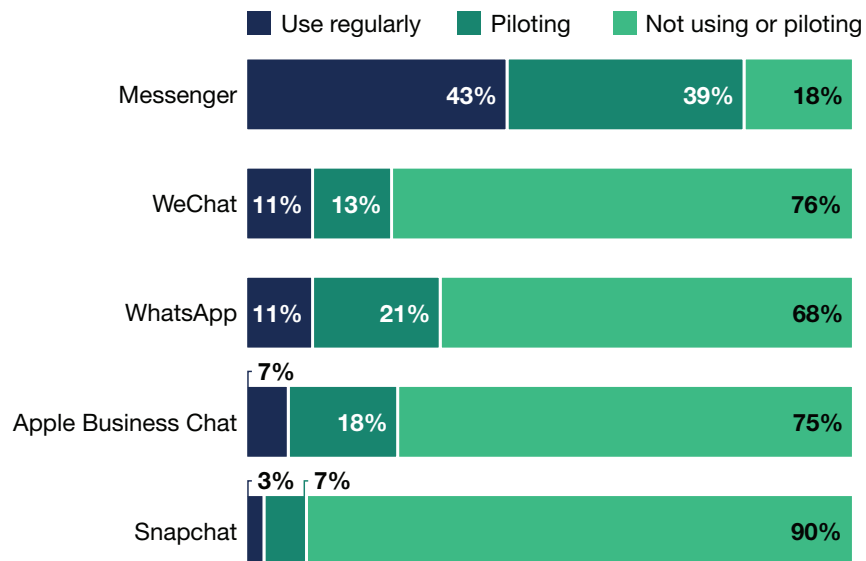
Firms Must Connect With Consumers On Their Channel Of Choice

The COVID-19 pandemic has forced both consumers and businesses into digital experiences at an unprecedented rate. Under the strain of more inbound calls, fewer staff, and dropping customer satisfaction due to wait times on the phone, customer service organizations have added mobile messaging — both as notifications and carriers of conversations — for customers. The benefits of adding messaging include elevated customer satisfaction, increased agent efficiency, broader channel choice for customers, and reduction in call volume.¹

Companies want to give consumers choice not only of channel, interaction mode, and platform, but also asynchronous options.² They've primarily delivered customer service through voice, website, apps, and SMS; they're also adopting third-party platforms to give consumers asynchronous choices (see Figure 1). Melissa Porter, SVP of customer experience at Tailored Brands (Men's Wearhouse), said, "We think all of our digital support channels are very important. Being available across so many different platforms allows the customers to work with us through their preferred platform, not ours."

FIGURE 1 Messenger Leads Adoption Among Third-Party Sites For Chat

"You mentioned that you are either using or piloting functionality with a third-party instant messaging platform. Which of the following platforms are you using or piloting with?"



Note: We excluded responses of "Don't know."

Base: 69 to 74 digital business executives

Source: Forrester's Global Emerging Technology Executive Survey (October 2018 to July 2020)

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Brands Face Headwinds With Third-Party Platforms

Brands face a complex future as the number of devices, platforms, and channels consumers use to access internet services grows each year.³ Twenty-three percent of surveyed US online adults use text-based chat to engage brands, and 20% prefer it to other interaction modes.⁴ Direct messaging channels are especially important to younger consumers (see Figure 2). But, despite the rise in consumer appeal, contact center decision-makers expanding their service offerings into messaging must contend with issues such as:

- **Channel choice leading to fragmentation.** Like SMS, each third-party messaging platform has rules and policies by which both small and large brands must abide. WhatsApp demands a brand response within 24 hours. Apple, Google, and WhatsApp ask brands to work through approved partners and not directly with them via an API. Each platform has unique features as well. Some include payments, for example. Fortunately, a host of CPaaS, digital-first customer service, and contact center solution providers are abstracting away this detail for brands by integrating not only access, but also policies and capabilities, into their solutions (see Figure 3).
- **Platform use varying by geography.** Consumers in North America still use SMS and native messaging applications due to historically inexpensive access. In nearly every other geography of the world, consumers moved to over-the-top (OTT) platforms more than a decade ago. More than 2 billion use WhatsApp globally, with 400 million of those users in India and 120 million in Brazil. Chinese consumers favor WeChat, while those in Japan choose Line, and Koreans prefer Kakao.
- **Consumers having to opt in to engage brands.** Third-party instant messaging platforms insist that consumers make the first move each time they engage the brand. Unlike the WeChat platform that dominates in China, the US-based brands mostly prohibit proactive promotional or marketing messages. Only Messenger permits promotional messages from brands, provided a consumer has initiated the engagement originally. An opt in is not carte blanche access, however; once a consumer opts in on Messenger, it grants the brand permission for just one year. Other platforms prohibit it entirely.
- **Platform owners insisting on elevation to humans — not just chatbots.** Chatbots are in high demand by both consumers and brands to tackle simple information queries, such as “Where is my Pad Thai from Ler Ros?” However, each platform wants to protect its users from a bad experience of any type. If a brand wants to leverage a third-party platform for chat, it must abide by that platform’s rules, e.g., access to human agents once automated processes stall, service-level agreements on response times, and more.
- **Customer service not being the focus of each third-party platform.** Each third-party messaging platform differentiates based on its inherent strengths, which may not be customer service. For example, Facebook allows consumers to move seamlessly to WhatsApp from ads on Instagram or Facebook — useful for either marketing or customer service. Google embeds messaging in

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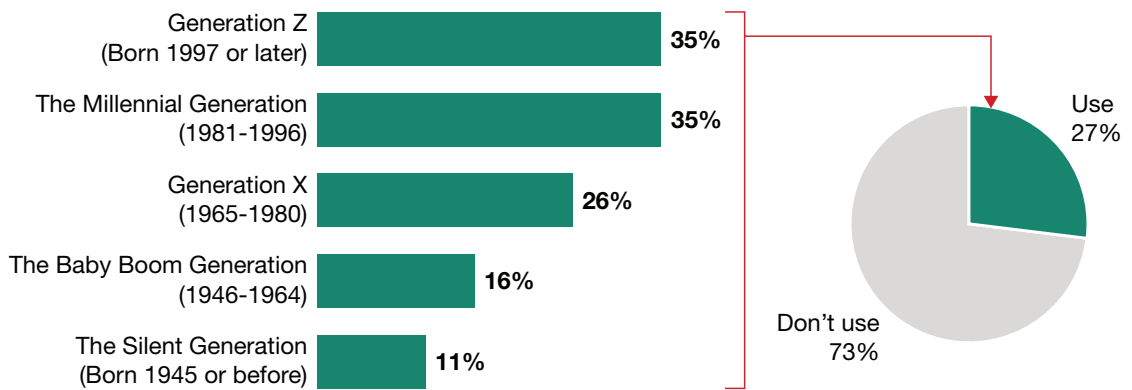
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its Google Map apps across all platforms as well as search results on its own Android platform. Meanwhile, a common entrée to Apple Business Chat (ABC) is through its map application (e.g., when a consumer searches for a business) or embedded links on a brand’s own site.

FIGURE 2 Consumers Of All Ages Use Chat

“Which of the following methods of communication do you use at least daily?”

Chat



Base: 4,835 US online adults (base sizes vary by age group)

Source: Forrester Analytics Consumer Technology® US Technology, Media, And Telecom Recontact 1 Survey, 2020

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FIGURE 3 Solution Providers Will Abstract Away Channel And Platform Fragmentation

	App	Apple Business Chat	Business Messages	Messenger	RCS	SMS	Web chat	WhatsApp
[24]7.ai		●	●	●	●	●	●	●
Clickatell				●		●	●	●
Comm100	●			●		●	●	●
Conversocial		●		●		●		●
eGain	●	●	●	●	●	●	●	●
Glia	●	●		●		●	●	●
Helpshift	●			●		●	●	
IMImobile	●	●	●	●	●	●	●	●
Khoros	●	●	●	●		●		●
LivePerson	●	●	●	●	●	●	●	●
LogMeIn				●		●		●
Oracle				●		●	●	●
Quiq	●	●	●	●	●	●	●	●
Salesforce				●		●		●
Twilio	●			●		●	●	●
Vonage	●			●		●	●	●

Messaging Platforms Offer New Opportunities In The US

We focused our research on the four most widely used emerging customer service platforms in the US — ABC, Google’s Business Messages, Messenger, and WhatsApp (see Figure 4).⁵ Operating system (OS) owners have platform advantages but are late to the game. Facebook’s portfolio has the advantage of numbers. None of the platforms charge brands to use their messaging services. Finally, all want to facilitate seamless experiences across channels for businesses and consumers.

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FIGURE 4 The Major Messaging Platforms Vary In Features And Policies

	Apple Business Chat	WhatsApp Business	Messenger	Google's Business Messages
Corporate owner	Apple	Facebook	Facebook	Google
Cost	Free	Free to small businesses; charges large businesses to send certain types of messages	Free; businesses can pay to send sponsored messages	Free for SMBs
Privacy	Encrypted between device and Apple's servers	End-to-end encryption between the customer and the business; large businesses can use a third-party vendor to operate the WhatsApp Business API on their behalf	End consumers provide information to the business	Policies include not requesting sensitive information over chat
Sign-up policy	Set up with Apple ID or through messaging service provider	The WhatsApp Business app is free to download for Android or iOS. To use the WhatsApp Business API, get attached through a solution provider (Docker); need a Facebook Business Manager account, WhatsApp business account, line of credit for WhatsApp business account	Open to all businesses with a Facebook page; can partner with third-party developers for advanced features	Sign up through Google MyBusiness, download the GBM app and toggle on messaging
Use cases	Customer service, scheduling	Customer service, timely notifications	Lead gen, commerce, and customer service	Customer care: inbound questions, deliver support

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FIGURE 4 The Major Messaging Platforms Vary In Features And Policies (Cont.)

	Apple Business Chat	WhatsApp Business	Messenger	Google's Business Messages
Entry point	Apple Maps, Siri, Safari, or iOS app, QR code, website, email, social media	A business's Facebook page, company website, app, email, SMS, QR code	A business's FB page, Facebook Chat Plugin, ads that click to Messenger, Facebook comments	Business posting, can initiate conversations from some browsers
Opt in	Customers must message first; if customer deletes conversation, business can no longer message	Customer must actively opt in to receive messages from businesses using the WhatsApp Business API or can initiate the message to receive support; business must inform customer what type of messages they will be receiving	Can send proactive messages for select nonpromotional use cases; customers can opt in to receive a follow-up message — business has one permission token that expires within one year	Only consumers can initiate. Business posts can include a message button for customers to request more details, asynchronous chat for SMB. Works on Android and iOS
Functionality (rich media, group texts, interactive texts, can let brands engage)	Visual lists, scheduling templates. Connects to Siri, Safari, Search, Maps, website, and iOS app. Can enroll customers in push notifications with permission	Can send text, message template, document, or media	Conversational starters, routing, menus, and rich media (GIFs, stickers, buttons, carousel, etc.)	Customer can reply to conversation and reengage at later date. Rich media: branded profile; image, video, GIFs; rich cards and carousels; interactive content; suggested replies/actions

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FIGURE 4 The Major Messaging Platforms Vary In Features And Policies (Cont.)

	Apple Business Chat	WhatsApp Business	Messenger	Google's Business Messages
Human required for chatbots	Recommends mix of bots and human agents; won't approve virtual agents only	Human escalation is required when using virtual assistants	Encourage escalation to a human, supported with "handover protocol"	Human escalation if customer question is too complex for automation
Limitations	Business must register with Apple; each role needs Apple ID	Free message if responding to customer within 24 hours. Outside of that, enterprise can send paid message template	For promotional messages outside of the 24 hour window, businesses need to use sponsored messages or one-time notification template	24 hours for business to respond to a user
Payments available	ApplePay	In the roadmap	Can set up using Messenger's webview	In the roadmap

Apple Business Chat

ABC is confined to the Apple ecosystem, but it works brilliantly within it. ABC's business partners may be smaller in number today in comparison to Facebook's, but interviewees characterized it as one of the fastest growing platforms as measured by volume. Tailored Brands' SVP of customer experience, Melissa Porter, told us, "We're very excited [about how ABC has performed]. We've seen a steady increase in volume and higher customer satisfaction from this channel." The ABC platform:

- **Offers a host of entry points for consumers.** iOS users can launch a conversation with a business through the messaging app; Apple Maps; browser; buttons (i.e., links) within websites, social media, and email; Chat Suggest (i.e., offered as an alternative to a phone call); and Business Cards surfaced through an OS-based search. Brands must register their phone numbers with Apple to autopopulate Apple Maps, Business Cards, and Chat Suggest. Brands must populate their own properties with the mechanisms to connect to iMessage directly. And these mechanisms work across Apple's portfolio of devices, including smartphones, smartwatches, computers, and tablets.
- **Blends agent assistance with automation.** ABC offers a host of tools and integrations that allow brands to serve their customers better through automation. ABC does permit brands to use automation or chatbots for triage but expect brands to offer consumers the ability to elevate to a human agent, at least during business hours. Brands are also using ABC for IVR deflection. While

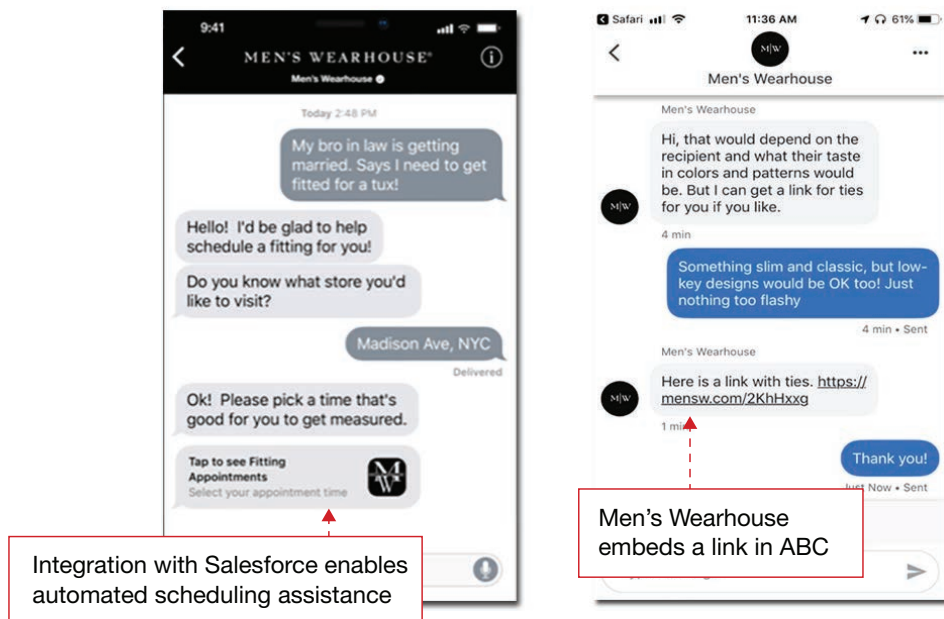
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Apple does not support this integration directly, contact center solution providers are helping brands transition consumers between these two channels. The CEO of Conversocial, Ido Bornstein HaCohen, told us that “it’s not easy to do, but if you do deflection right, companies see increased operational efficiency and improved CSAT and NPS scores.”

- **Differentiates through transactions, authentication, and privacy.** ABC allows brands to influence purchases (e.g., scheduling appointments, finding inventory) and sell to consumers via Apple Pay directly within ABC. Men’s Wearhouse, for example, enables its staff to convert more-general store or product inquiries into product recommendations or even an appointment for a fitting by automating the scheduling through a Salesforce integration (see Figure 5). Moreover, ABC supports services firms such as banks or telecommunications providers by offering authentication.⁶
- **Supports small, medium, and large businesses differently.** ABC does not have a dedicated product for small businesses like some of its counterparts, but it does support them. Large enterprises will work through what Apple refers to as a Messaging Service Provider (MSP) such as Conversocial, LivePerson, Quiq, or Twilio. Smaller entities such as the local coffee shop access ABC through Shopify.

FIGURE 5 Men’s Wearhouse Uses Apple Business Chat To Connect With Customers



Source: Men’s Wearhouse

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Google's Business Messages

Google has offered messaging services in the past — remember Allo? While it's the last among the largest tech players in the US to enter the messaging field with a serious business play, it does so with both a broad and robust offering that builds on its strengths as a lead generation destination for consumers. Google offers not only voice and messaging services, but also supports a more global update to SMS known as Rich Communication Services (RCS) that works on a host of Android devices when supported by the carrier and enabled by the consumer.⁷ Google's business voice-, text-, and messaging service:

- **May ultimately differentiate on enabling commerce or influencing purchases.** Contact center or messaging solution providers such as IMImobile, Khoros, and Vonage integrate with Business Messages along with a dozen other platforms to give their clients, and their ultimate customers, choice of channel within customer service. However, when it comes to commerce, Google has the upper hand to influence purchase decisions by helping consumers connect directly to brands to schedule appointments, talk to experts, or find inventory. Imagine connecting directly to a human for high consideration purchases such as cars, outdoor gear, appliances, and more.
- **Builds on its strengths for lead generation.** One of the primary entry points for consumers into Google's messaging platform is through search within the Maps application on either iOS or Android devices or search on an Android phone (see Figure 6). If the business has registered with Google or enabled messaging services, a chat icon will appear in the Maps or phone results.⁸ More than 150 million businesses globally are on Maps. Enterprises can also enable consumers to launch Business Messages from their own websites within the Chrome Browser on Android with support for websites on the iOS ecosystem coming in the fall of 2020.
- **Authenticates or verifies brands' identities to mitigate fraud on its own devices.** Google is branding this feature through Verified SMS or Verified Voice. Launched in December 2019, Verified SMS messages have both a brand's name and a "Verified" icon at the top of the message.⁹ Verified Calling offers not only the name of a brand for an application-to-person (A2P) or inbound call to a consumer, but forces the business to give a reason for calling, such as marketing, bill collection, or status update on a claim. As of summer 2020, the Verified Calls feature works only on Google's own hardware and a selection of Android devices, while Verified SMS is rolling out gradually throughout geographies.
- **Benefits through an existing customer base and ecosystem partners.** By adding Business Messages into its existing portfolio of services, Google gains access to an installed base of nearly 5 million small businesses using the messaging platform already. Unlike WhatsApp, Google does not offer a dedicated app for small business owners. Like Apple and WhatsApp, enterprises will work through messaging ecosystem and digital-first customer service partners to add Business Messages as an option within their contact centers.

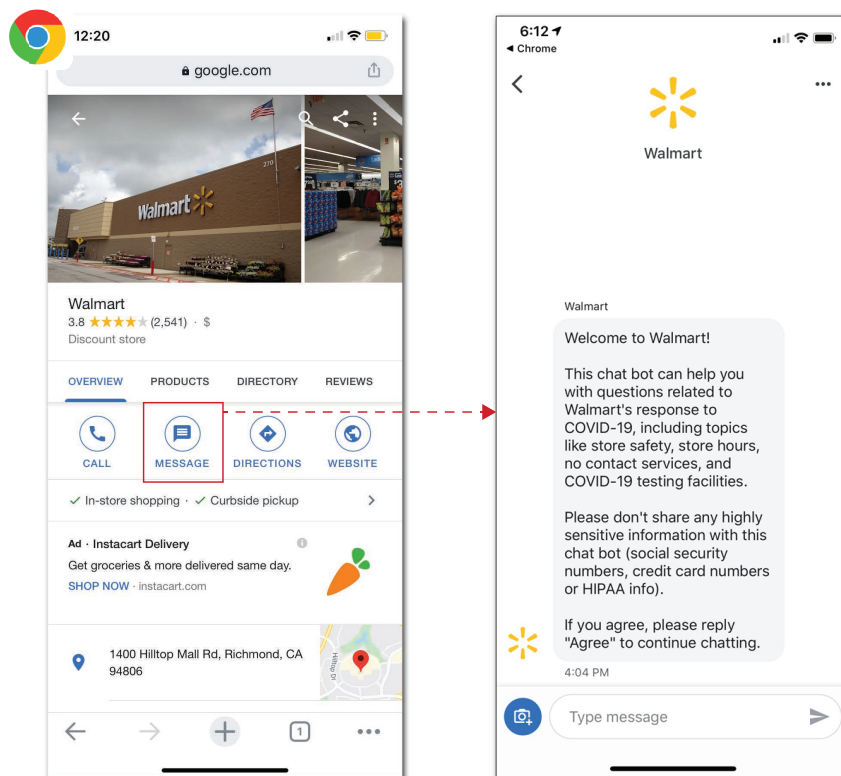
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- Suffers from fragmentation.** Google's portfolio of business messaging and voice services benefits consumers through both seamless and rich-featured experiences. Not unlike Apple's own iOS ecosystem, the magic occurs within Google's own environment, including hardware, operating system, and apps end-to-end. Google does not manufacture the vast majority of hardware leveraging the Android OS, and it lacks control over when or if the wireless carriers will implement RCS or ship devices with its services embedded.

FIGURE 6 Consumers Can Access Business Messages Through Multiple Entry Points

6-1 On iOS, consumers can chat with brands via the entry point in native search



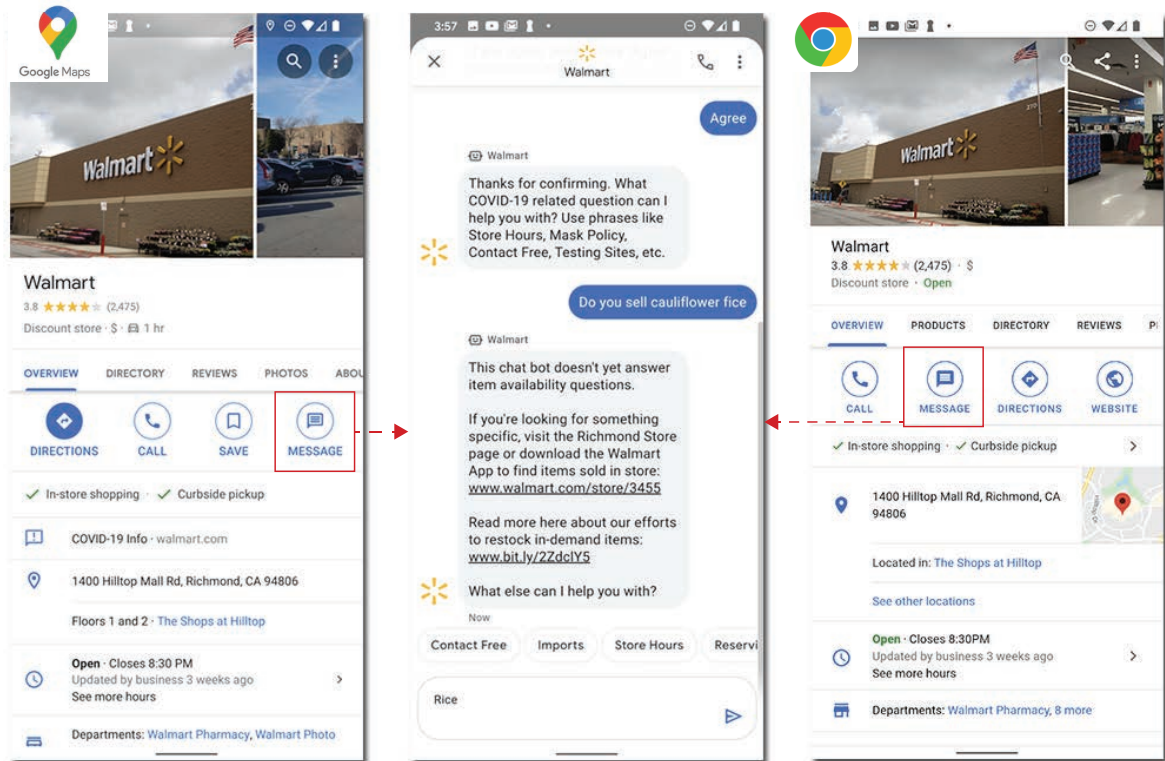
Source: Walmart

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FIGURE 6 Consumers Can Access Business Messages Through Multiple Entry Points (Cont.)

6-2 On Android, consumers can chat with brands via entry points in Google Maps or native search



Source: Walmart

Messenger

Facebook, Inc. (inclusive of Facebook app, Messenger, Instagram, WhatsApp, and other apps, services, and hardware, and called “Facebook” for the purposes of this report) offers its business customers three messaging platforms: Instagram Direct, Messenger, and WhatsApp. Among brands surveyed using third-party platforms for chat, 43% were using Messenger and 39% were piloting the platform.¹⁰ Messenger’s appeal lies in the sheer volume of users across the Facebook ecosystem.¹¹ Enabling businesses to sell through Messenger is important enough to Facebook that it was highlighted in its Q2 2020 earnings call.¹² Messenger:

- **Boasts several years of experience in the US.** Facebook opened Messenger to businesses in 2016. At the time, Messenger already had an installed base of 50 million businesses. The initial intent was for brands to use chatbots to answer consumer questions; get news, alerts, or tickets; and even make purchases. While Facebook envisioned natural language chatbots in the future,

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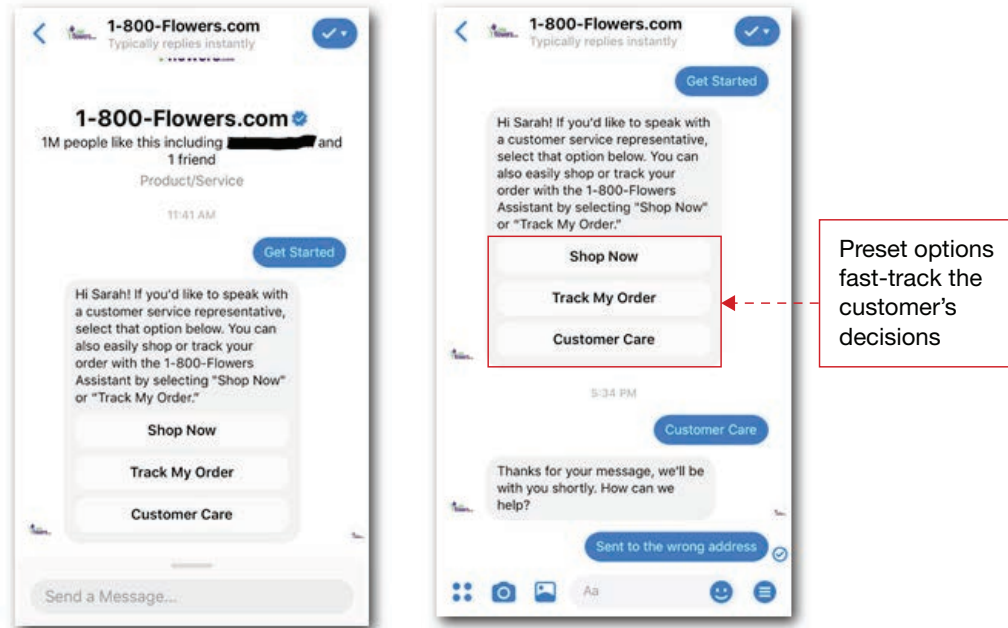
brands like 1-800-Flowers.com started with chatbots leveraging simple dialogs or multiple-choice questions (see Figure 7).¹³ WestJet, a Canadian airline, deployed a chatbot on Messenger that now handles 50% of all customer inquiries.¹⁴

- **Integrates with Facebook and Instagram through click-to-messaging ads.** Click-to-messaging ads will help Facebook demonstrate a quantifiable ROI of advertising on its platform. Advertisers on Facebook can enable chat buttons within their ads to migrate consumers into the Messenger platform and eventually into web pages where they can transact. Domino's Pizza uses these ads (see Figure 8). Transactions still happen within a web view, but Facebook is working hard toward adding payment options within Messenger.
- **Permits communicating with consumers proactively.** Unlike its main competition in the United States, Messenger allows brands to send notifications to consumers on its platform for limited scenarios.¹⁵ Businesses using Messenger's API can send proactive messages for select nonpromotional use cases using message tags.¹⁶ Businesses can also send promotional updates in Messenger using sponsored messages. These proactive notifications include reminders, updates on recently purchased items, and nonrecurring changes to an application or account. Human agents can also respond to messages sent by users within the past seven days.
- **Focuses on small businesses.** Facebook launched Facebook Shops in May 2020 on both Facebook and Instagram.¹⁷ In doing so, Facebook wanted to give small businesses the ability to easily sell online to the Facebook community. Consumers can find the shops on a business's Facebook Page or Instagram profile or discover them directly on a brand's website or through the click-to-messaging ads that link to Messenger, Instagram Direct, or WhatsApp. Consumers can make purchases on the business's website or within Instagram if the business has checkout enabled in the United States.¹⁸
- **Facilitates chat between non-Facebook consumers and businesses.** Facebook's app has a chat plugin that allows businesses with a Facebook page to communicate with consumers directly on its own website through Messenger. However, in the past, consumers had to be logged into the Facebook app. In August 2020, Facebook launched an updated Facebook Chat Plugin without this requirement (see Figure 9).

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FIGURE 7 1-800-Flowers.com Limits Options To Set Clear Expectations And Drive Satisfaction

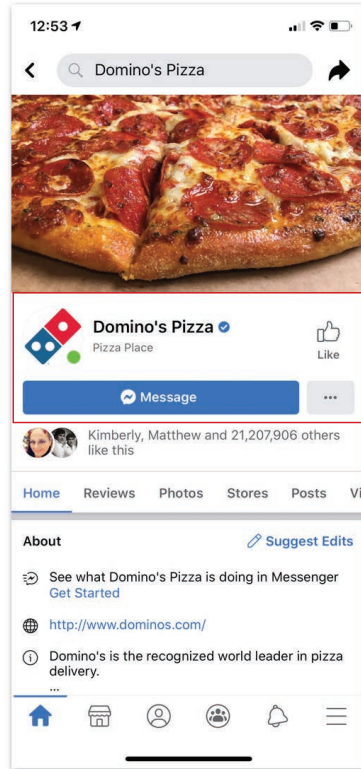


Source: 1-800-Flowers.com

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FIGURE 8 Domino's Pizza Directs Traffic From Facebook Into Messenger To Transact



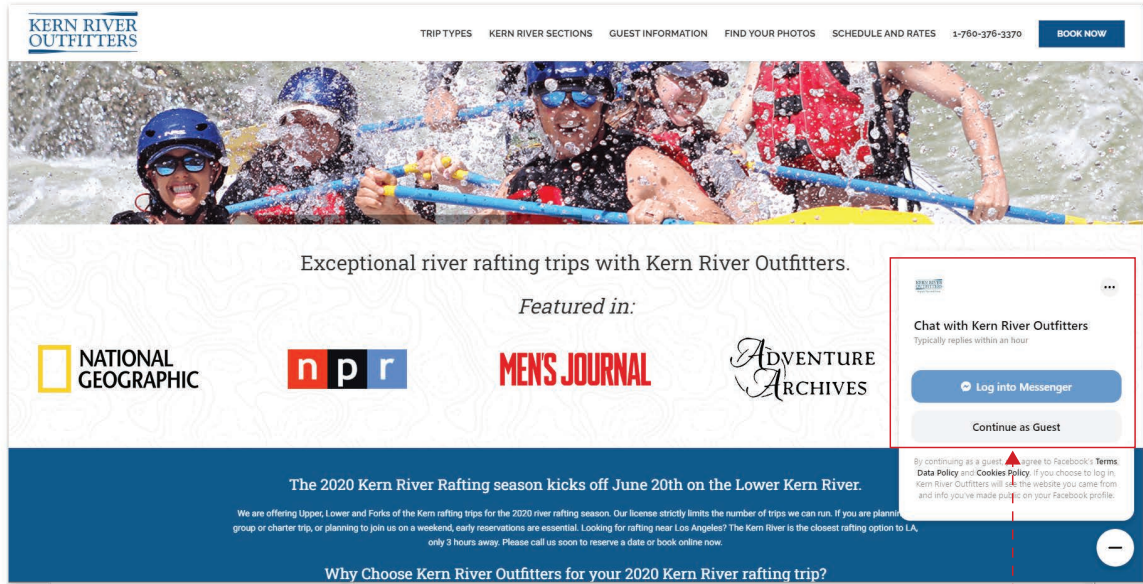
Brands can integrate click-to-chat on Messenger directly into their business's FB page.

Source: Domino's Pizza

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FIGURE 9 Consumers Can Chat With Brands On Messenger Without Logging Into Facebook



Messenger's August 2020 Chat Plugin allows consumers to launch a Messenger conversation as a guest directly from a brand's website.

Source: Kern River Outfitters

WhatsApp

WhatsApp introduced its WhatsApp Business application for iPhone and Android in January 2018, aimed at helping small business owners better connect with their customers. WhatsApp quickly rolled out a corresponding API later that year, allowing larger brands to use the platform for customer service. Many thought that WhatsApp would be a version of WeChat outside of China, but like its North American counterparts, WhatsApp has worked hard to protect its customers' experiences by focusing on customer service and not marketing. WhatsApp:

- **Reaches the largest global audience on a single third-party platform.** WhatsApp boasts two billion users including 400 million in India and 120 million in Brazil and stretches across more geographies than its competitors.¹⁹ While WhatsApp works on any smartphone, its power lies in offering a single platform that stretches across a global Android landscape fragmented by device, OS, and carrier choice. For these reasons, Volaris Airlines, a Mexican carrier, uses WhatsApp to reach broader demographics more reluctant to download new apps (see Figure 10).

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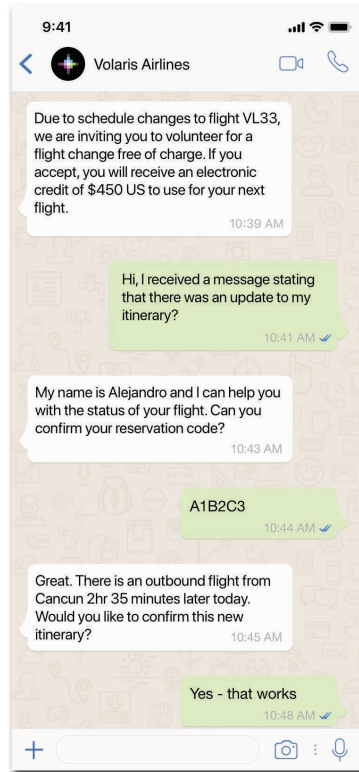
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- **Protects privacy through end-to-end encryption.** WhatsApp offers encryption of messages that consumers send the business and vice versa.²⁰ Customer service transactions can include initiating payments or transfer of funds to pay bills. In countries where WhatsApp payments are available, even though credit card and bank numbers are stored encrypted, the payments themselves are not encrypted. Protecting a consumer's identity is table stakes, with each platform offering its own version. Not even WhatsApp can see the content, including messages, videos, photos, voice messages, documents, status updates, and more.
- **Leverages FB and Instagram ads to facilitate consumers communicating with brands.** WhatsApp prohibits brands from proactively engaging consumers through notifications; the business must obtain an opt in from the customer first. As with WhatsApp counterparts, consumers must initiate the conversations. WhatsApp does, however, leverage ads on Facebook and Instagram that offer a click-to-chat option to consumers to connect with brands (see Figure 11).²¹ Inserting the ability to start conversations into existing workflows is essential to offering consumers the convenience they seek. Consumers can also opt in by scanning a QR code or adding a business phone number.
- **Provides a dedicated solution to small businesses.** WhatsApp started with small businesses and remains committed to their success. The small business solution boasts 50 million users globally. Employees or owners of small businesses use a mobile app built on the same bones as its consumer counterpart. Businesses can show basic business information, e.g., hours, location, or a catalog of what they sell. A broad set of small businesses from coffee shops to hair salons have effectively leveraged the app to communicate with their customers.²²
- **Is second only to SMS in IVR call deflection.** Customers are happily shifting from long voice call queues to asynchronous chat (see Figure 12). Across solution providers supporting contact centers, WhatsApp ranks only behind SMS and Messenger in integrations or availability to agents. Allen Hankins, director of digital product at DirecTV LATAM, said that SMS volumes were "being eaten up by WhatsApp" after his team added WhatsApp to the error code contact page and removed the SMS contact number. He expects that, by the end of 2019, WhatsApp to hold "95% of prepaid traffic," and SMS volumes to decrease from 16% to less than 5% of overall traffic.

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FIGURE 10 WhatsApp Reaches More Consumers Than Most Brands' Apps

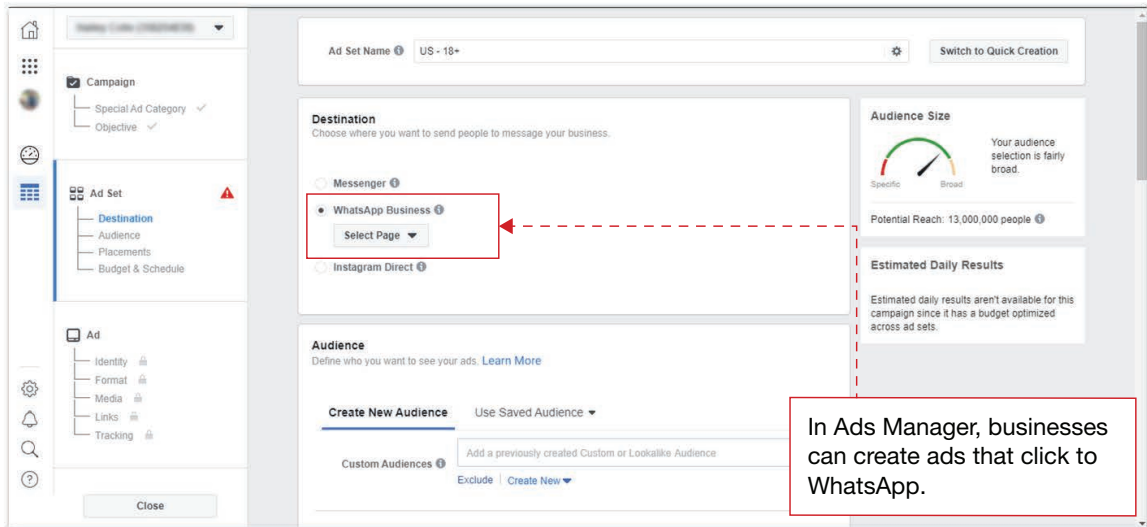


Source: Volaris

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FIGURE 11 Businesses Leverage Facebook Ads For WhatsApp Communication

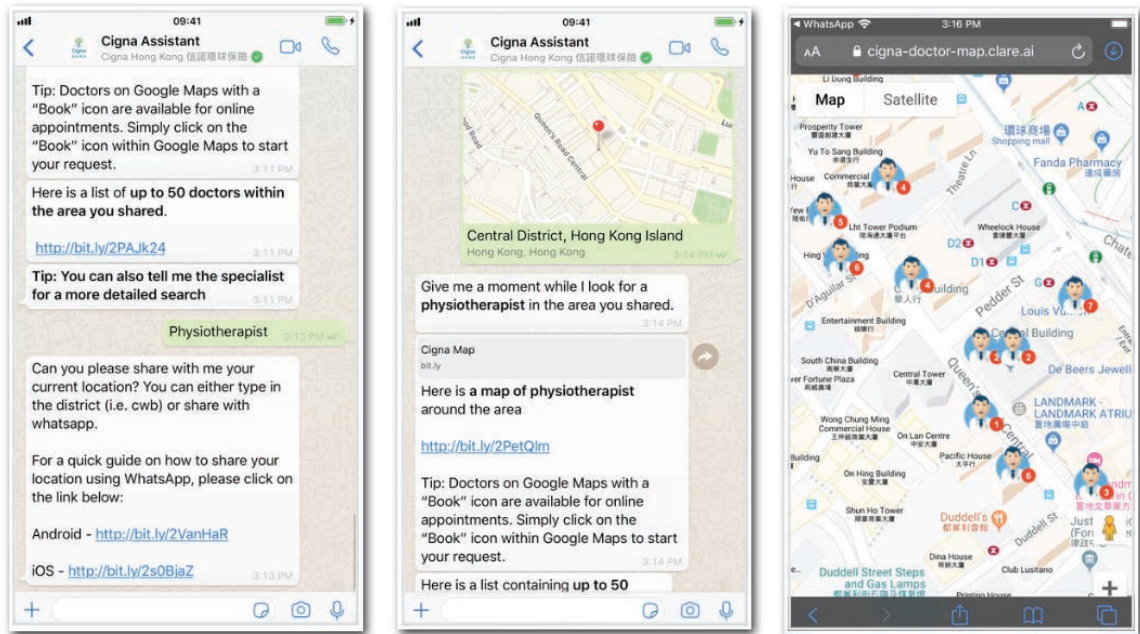


Source: Facebook

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FIGURE 12 The Cigna WhatsApp Virtual Agent Reduces Contact Center Call Volume



Powered by artificial intelligence, the Cigna WhatsApp assistant is capable of handling common customer requests in a matter of seconds, like finding suitable doctors or medical experts based on location and specialization. It also provides people with details such as clinic locations, operating hours, and directions. The virtual assistant helped reduce the volume of calls handled by live customer agents, who were then free to assist people with more complex queries.

Within the first week, Cigna resolved more than 1,000 inquiries, achieved a 91% customer query resolution rate, and responded three times faster to customer inquiries than previously. Cigna HK worked with solution provider Clare.AI to build the experience.

Source: "Cigna Hong Kong," Facebook for Business

Recommendations

Pursue A Measured, Agile Approach To Adopting Chat Platforms

The future of customer service will be embedded in existing customer workflows, whether in social media, maps, apps, messages, or more. Third-party messaging platforms can provide value to most brands regardless of industries, but some verticals have a greater affinity with messaging. Brands with real-time customer needs — airlines with customers racing for flights or an audio/visual equipment retailer with customers looking to configure the right system to buy — have myriad customer service use cases for which messaging makes a great fit.

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Brands need a multipronged approach to customer service that offers support both on their own properties as well as those where consumers spend most of their time. But brands need not swing for the fences right away. Tobias Goebel, a customer service expert, says his mantra is to start small: “You don’t have to take all channels at once.” To get started, customer service leaders should:

- **Prioritize where your customers use communication.** Two factors are in play as you decide where to start. First, know where your customers are. Use Forrester Analytics’ Consumer Technographics® data to understand not only which of these platforms your customers use daily or weekly, but how comfortable they are using them to either engage with brands for customer service or transactions.²³ [Forrester’s Moments Map, 2020](#) will help you here. Second, find out if you have permission to use that platform and on what terms.
- **Tap into case studies and help from third-party platform partners.** Apple, Facebook, and Google host annual developer conferences, support developers with tools, and offer resources to ensure that experiences on their platforms meet their expectations. Apple’s developer platform, for example, provides best practices for communicating with customers on Business Chat. Your digital-first customer service partners such as eGain, Khoros, LivePerson, and Quiq may also have experience or offer professional services to help you get started.²⁴
- **Start with small use cases and engagement — not volume KPIs — with chatbots.** Starting small, iterating and expanding as you learn are essential elements of an agile approach. Not only can you learn, but you can also avoid big mistakes that may damage your brand’s reputation. Overstock.com used Quiq to deploy Business Chat in 2018, with a focus on resolving questions around specific promotions only. As you do so, establish clear expectations for what your chatbot can and cannot answer before setting your chatbot loose on your customers.²⁵ Finally, focus on resolving customer issues — not transferring volume to prove channel viability.
- **Staff your digital channels with digital natives.** Tobias Goebel, a Twilio product manager, says “agent skill sets (for digital channels) must be different from traditional channels. Digital agents need to speak the digital speak, use emojis (encourage brands to do that, it’s natural), embed links, be able to pull things from different sources into one.” Goebel also notes that he’s seen digital natives being able to get onboarded, ramped, and successfully using the tools for digital channels very quickly as it seems to be very intuitive for them.
- **Continue to watch for unique messaging options on social media networks.** Instagram, Snap, and Twitter also offer direct messaging between brands and consumers. The natural inclination for consumers to use these channels for direct messaging is lower than on dedicated messaging platforms. However, brands will have unique opportunities to engage consumers at different stages of the customer lifecycle, especially during exploration. Enterprises must find ways to route inbound communications from all of these platforms seamlessly whether to a marketing department, account services, or a contact center. Forrester has more research planned to cover these platforms.

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Supplemental Material

Survey Methodology

The Forrester Analytics Consumer Technographics US Technology, Media, And Telecom Recontact 1 Survey, 2020, was fielded from February through March 2020. This online survey included 4,835 respondents in the US between the ages of 18 and 88. For results based on a randomly chosen sample of this size, there is 95% confidence that the results have a statistical precision of plus-or-minus 1.4% of what they would be if the entire population of US online adults (defined as those online weekly or more often) had been surveyed. The data was weighted by age, gender, income, broadband adoption, and region to demographically represent the US online adult population. The survey sample size, when weighted, was 4,835.

(Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) The programming language herein reflects the survey respondent base for each question. Bases for specific questions have been changed in

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published data for increased clarity. Therefore, the base in published data may not match the base language in this document. Dynata fielded this survey on behalf of Forrester. Survey respondent incentives included points redeemable for gift certificates.

Forrester's Global Emerging Technology Executive Survey

Forrester's Global Emerging Technology Executive Survey is an ongoing survey fielded to executives with knowledge of digital experience initiatives. For quality assurance, we screen respondents to ensure they meet minimum standards in terms of knowledge and insight into their companies' digital experience initiatives. Forrester started the survey in October 2018. Respondent incentives include a summary of the survey results, a custom mobile messaging strategy scorecard, and the opportunity to participate in future research. Exact sample sizes and survey dates are provided in this report on a question-by-question basis. This survey uses a self-selected group of respondents and is therefore not random. This data is not guaranteed to be representative of the population, and, unless otherwise noted, statistical data is intended to be used for descriptive and not inferential purposes. While nonrandom, the survey is still a valuable tool for understanding where users are today and where the industry is headed.

Companies Interviewed For This Report

We would like to thank the individuals from the following companies who generously gave their time during the research for this report.

[24]7.ai	IMImobile
Apple	Khoros
Braze	LivePerson
Cactus Jungle	LogMeIn
Clickatell	Messenger
Comm100	Oracle
Conversocial	Quiq
eGain	Salesforce
Glia	Tailored Brands
GM Financial	Twilio
Google	Vonage
Helpshift	WhatsApp

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Endnotes

- ¹ See the Forrester report “[SMS: Customer Service’s Ultimate Workhorse.](#)”
- ² See the Forrester report “[The 3D Connected Consumer In 2020](#)” and see the Forrester report “[Forrester’s Moments Map, 2020.](#)”
- ³ See the Forrester report “[The 3D Connected Consumer In 2020.](#)”
- ⁴ See the Forrester report “[Forrester’s Moments Map, 2020.](#)” Source: Forrester Analytics Consumer Technographics Benchmark Survey, Part 1, 2020.
- ⁵ For more information on digital-first customer service solutions, see the Forrester report “[The Second Coming Of Digital-First Customer Service Solutions.](#)”
- ⁶ While ABC is not yet HIPAA-compliant, it does protect consumer privacy by hiding a consumer’s name, phone number, or other personally identifiable information (PII).
- ⁷ To read more about Rich Communication Services (RCS), see the Forrester report “[RCS: More Myth Than Magic — For Now.](#)” Source: Julie Ask, “RCS: What’s Going On?” Forrester Blogs, January 29, 2020 (<https://go.forrester.com/blogs/rcs-whats-going-on/>).
- ⁸ Messaging surfaces whether a consumer conducts a local search, organic search, or lands on an Answer Card.
- ⁹ When Verified SMS is on and you receive a message from a business registered with Google, Google translates the message you receive into an unreadable authenticity code, all on your device. Then, Google compares this code with unreadable authenticity codes sent to Google by the business. Source: “How Verified SMS works,” Google (<https://support.google.com/messages/answer/9326240?hl=en>).
- ¹⁰ See the Forrester report “[Consumers Want Convenience, Not Conversations.](#)” Source: Forrester’s Global Emerging Technology Executive Survey (October 2018 to July 2020).
- ¹¹ According to one attendee of Facebook’s 2019 F8 conference, “A full 60% of the keynote was dedicated to messaging channels.”

Source: Kurt Wagner and Sarah Frier, “Instagram Direct Is Being Rebuilt Using Facebook Messenger’s Technology,” Fortune, August 8, 2019 (<https://fortune.com/2019/08/07/instagram-direct-facebook-messenger-technology/>).
- ¹² Source: “Facebook (FB) Q2 2020 Earnings Call Transcript,” The Motley Fool, July 31, 2020 (<https://www.fool.com/earnings/call-transcripts/2020/07/31/facebook-fb-q2-2020-earnings-call-transcript.aspx>).
- ¹³ See the Forrester report “[Consumers Want Convenience, Not Conversations.](#)”
- ¹⁴ As additional context: more than 300,000 brands have implemented chatbots on Messenger. Messenger’s launch included iconic brands and scenarios including boarding passes from KLM, flowers from 1-800-Flowers.com and pizza delivery from Domino’s.
- ¹⁵ Source: “One-time Notification (Beta),” Facebook for Developers (<https://developers.facebook.com/docs/messenger-platform/send-messages/one-time-notification>).
- ¹⁶ Source: “Message Tags,” Facebook for Developers (https://developers.facebook.com/docs/messenger-platform/send-messages/message-tags#supported_tags).
- ¹⁷ Source: “Introducing Facebook Shops: Helping Small Businesses Sell Online,” Facebook, May 19, 2020 (<https://about.fb.com/news/2020/05/introducing-facebook-shops/>).
- ¹⁸ Source: “Introducing Checkout on Instagram,” Instagram, March 19, 2019 (<https://about.instagram.com/blog/announcements/introducing-instagram-checkout>).
- ¹⁹ Source: Julija Andjelic, “WhatsApp Statistics: Revenue, Usage, and History,” Fortunly, June 9, 2020 (<https://fortunly.com/statistics/whatsapp-statistics#gref>).

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²⁰ Source: “About end-to-end encryption,” WhatsApp (<https://faq.whatsapp.com/general/security-and-privacy/end-to-end-encryption/>).

²¹ Source: “Business Help Center,” Facebook for Business (<https://www.facebook.com/business/help/447934475640650?id=371525583593535>).

²² “Due to social distancing restrictions, Italian coffee shop owner, Nicola Taranto, had to get creative and reimagine what a virtual coffee experience could look like. With the help of Facebook, Instagram, and WhatsApp, he promoted online sales and free home delivery to people interested in coffee within 10 to 12 miles of his store, and he saw a 20-times return on ad spend.” Source: “Facebook (FB) Q2 2020 Earnings Call Transcript,” The Motley Fool, July 31, 2020 (<https://www.fool.com/earnings/call-transcripts/2020/07/31/facebook-fb-q2-2020-earnings-call-transcript.aspx>).

²³ See the Forrester report “[Forrester’s Moments Map, 2020](#)” and see the Forrester report “[Guide: How To Use The Moments Index](#).”

²⁴ Source: “Responding to Customers,” Apple Developer (<https://developer.apple.com/design/human-interface-guidelines/business-chat/customer-interaction/conversational-interaction/>).

²⁵ For more information on how to deploy and set expectations for customer-facing chatbots, see the Forrester report “[Forrester Infographic: Customer Service Chatbots Fail Consumers Today](#).”

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