Optimove-TextLocal API Integration

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Introduction

The integrated solution of TextLocal and Optimove helps increase customer engagement and spend by using predictive customer modeling to personalize text message-based retention campaigns.

Marketers use Optimove to plan their customer marketing campaigns based on advanced customer segmentation available in the product. Using Optimove's customer modeling system, marketers are able to easily define and discover interesting groups of customers to target – groups that the company's marketers wouldn't have been able to identify and target otherwise.

The next step is for the marketing team to develop the particular offers or incentives they want to send each target group of customers.

Every night, the Optimove software generates the specific lists of customer IDs to receive each pre-planned marketing campaign – along with the TextLocal template ID and scheduled send time. Optimove pushes the lists to TextLocal via API and TextLocal then sends out each personalized campaign at the specified time.

During and after the campaign's execution, Optimove reports on the financial success metrics of each campaign (compared to a pre-selected control group) or the winner of an A/B campaign test, and incorporates text message delivery metrics acquired via TextLocal's API.

To summarize, the Optimove software connects to TextLocal via API for two purposes:

1. To instruct TextLocal to send out a particular text message template to a specified list of customer IDs
2. To receive delivery metrics from TextLocal

Note: Optimove supports sending SMS messages via TextLocal, but not MMS messages.

How it Works

1. Prepare a Customer Contact Group in TextLocal

Once the marketer has opened a TextLocal account, his first step is to export the required customer data into TextLocal. At a minimum, this data will include customer ID, first name, last name and phone number. It is important that the freshness of this data be maintained on a daily basis, e.g., when new customers join, their information must be promptly updated in TextLocal.

Who does it: the marketer, with support from TextLocal.

2. Prepare Customer Data for Import into Optimove

The marketer, usually with assistance from internal IT staff, prepares the company's raw data into specific formats required by Optimove. These customer profile tables, which describe each customer's attributes, will be imported daily by Optimove. Optimove uses this data to segment customers into a variety of dimensions (lifecycle stages, micro-segments, etc.) and to track the behavior of customers and target groups over time.

Who does it: the marketer, with support from internal IT staff and Optimove integration staff. When required, Optimove staff can take a leading role in this stage.

3. Define the Sender Name for Text Messages Sent by Optimove

By default, text message campaigns executed by Optimove are sent using the "sender" name defined in TextLocal's user interface. If the marketer would prefer that campaigns sent by Optimove use a different sender name, Optimove staff can configure a different sender name for the campaigns executed by Optimove.

Who does it: Optimove sets this up in the software upon request, using a sender name provided by the marketer.

4. Connect Optimove to the TextLocal API

In order for Optimove to connect to the TextLocal API, the software must be configured with login credentials to the client's API instance as well as the ID of a particular Contact Group in TextLocal. All communication between the Optimove and TextLocal servers is via TextLocal API. (For the technically inclined, TextLocal's API guide can be seen [here](#).)

Who does it: Optimove sets this up in the software, using credentials provided by the marketer.

5. Create and Send Customer Campaigns

Select a Text Message Template

When the marketer sets up a text message campaign in Optimove to be sent via TextLocal, the software retrieves a list of all available text message templates via the TextLocal API. The user can choose the desired template for the campaign from a drop-down list and can also view a preview of the email itself from within Optimove.

Note: TextLocal supports multi-lingual campaigns; the marketer can define a campaign within TextLocal containing numerous sub-campaigns translated into various languages. To use such a campaign from within Optimove, the marketer simply selects the relevant high-level campaign and TextLocal will actually send the relevant sub-campaigns according to the predefined custom field in TextLocal. Configuration of multi-lingual campaigns is outside the scope of the Optimove integration; this should be done with the marketer's TextLocal account manager.

Optimove Sends the Text Message Campaign via TextLocal

Each time Optimove actually sends a text message campaign via TextLocal, Optimove connects to the TextLocal API and performs the following steps:

1. Optimove creates a TextLocal "segment" which contains the list of customer IDs to receive the text message. Notes:
   a. This customer list is generated by Optimove according to the target group segmentation defined within Optimove.
   b. Optimove does not store actual customer phone numbers in its database. Rather, the customer IDs used by the client to identify each customer are used.
2. Optimove instructs TextLocal to send the text message by providing the following parameters:
   a. The ID of the previously-created segment
   b. The ID of the text message template to use (this is selected by the user, in Optimove's Run Campaign wizard, from among all the text messages campaign templates created by the user inside TextLocal)
   c. The date and time of day when TextLocal should deliver the text message (this is also specified by the user in the Run Campaign wizard)

Text Message Campaign Metrics

Once each day, for a period of one week following the sending of each TextLocal mailing, Optimove connects to the TextLocal API in order to retrieve delivery rate metrics for the campaign. These metrics are displayed within Optimove's Campaign Analysis page for each executed campaign.