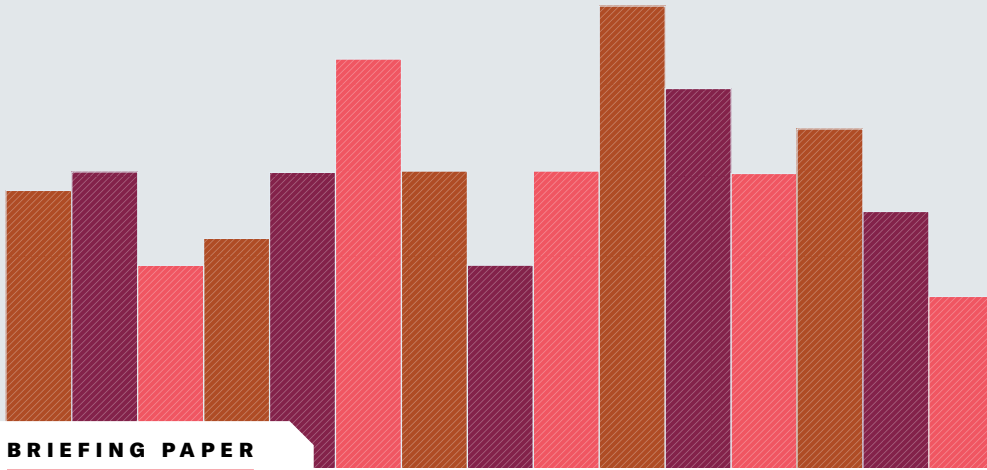




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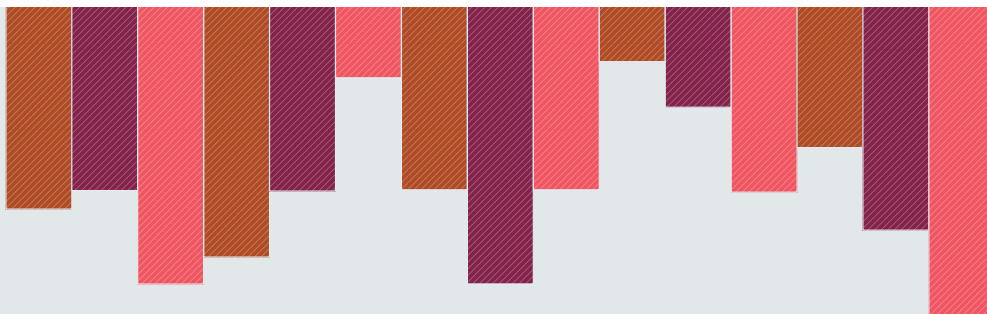
ANALYTIC SERVICES



BRIEFING PAPER

Engage, Convert, Repeat:

The Winning Formula of SMS and Email Marketing



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When I joined Intuit Mailchimp in 2017, SMS was considered the nice-to-have sidekick to an email campaign rather than a hero communication strategy. Since then, SMS has become a need-to-have channel that works alongside email to supercharge your marketing, build loyalty, and better connect with your customers.

And it's not a surprising development. In the evolving landscape of customer engagement, communication will always be the No. 1 key to success. In that evolution, SMS has quickly established itself as one of the most powerful tools in your marketing toolbox. From my point of view, here's why SMS is here to stay.

SMS Meets Customers Where They Are

Did you know the average person spends as much as three hours and 50 minutes per day on their mobile devices? It's no surprise that one of the best ways to reach your customers is by sending an SMS message to those devices. It's a quick, simple, time-sensitive, and personal strategy for communicating with customers.

SMS Works Better With Email

When you streamline your email and SMS campaigns in one place, you're making a big stride in accelerating growth and automating your marketing. In fact, marketers for midsize companies find they can gain a competitive edge when they combine the long-term success of email marketing with the unmatched 98% open rate of SMS messages. Together, they create a dynamic duo in your customer journey, fostering engagement and driving conversions.

SMS Delivers Always-On Marketing for Any Industry

Just like email, marketers can automate their SMS marketing with triggers that can be customized for a variety of industries and use cases.

For instance, e-commerce and retail often use SMS for flash sales, limited-time offers, shipping updates, and even product recommendations. Food and beverage companies leverage SMS for everything from order confirmations to delivery updates to gathering reviews. Even the nonprofit sector can tap into the real-time communication of SMS with donation requests, volunteer opportunities, event invitations, and more.

Adding SMS is one of the simplest, yet most powerful strategies you can bring to your marketing. At Mailchimp, we make it easy by integrating SMS into the No. 1 email marketing and automations platform. Benefit from high open and engagement rates, target specific segments with personalized messages, and use SMS to complement your other channel strategies like email and social media. Yep, a simple text message can drive engagement, loyalty, and most of all, results.

But don't just take my word for it. Our friends at Harvard Business Review Analytic Services dove deep into why SMS is a channel every marketer should use. Read the briefing paper to learn more and explore how we can be a part of it at [Mailchimp.com/SMS](https://mailchimp.com/sms).



Wade Burrell

Senior Product Marketing Manager
Intuit Mailchimp

Engage, Convert, Repeat: The Winning Formula of SMS and Email Marketing

Meeting customers where they are today means companies have to meet them on their cell phones. The average person spends as much as three hours and 50 minutes per day on their mobile devices.¹ Small wonder then that many organizations have found that the best way to communicate with their customers now is by sending them SMS text messages alerting them to promotional and transactional information in a quick, simple, time-sensitive, and personal way.

In particular, marketers for midsize companies, which have between 10 and 500 employees, are finding that they can gain an edge over their competitors when they combine the long-term success of email marketing with SMS text messages that are opened by cell phone recipients nearly 98% of the time.² When done right, having SMS and email marketing work cohesively together can pack a punch and lead to better business outcomes, such as higher sales and revenues and increased customer loyalty.

“We get texts from our loved ones, whereas we get emails from everybody, so it is a more intimate way to be in contact. SMS messages are not immediately dismissed by consumers the way that emails can be, so there is a higher likelihood of consumers opening the messages,” says Koen Pauwels, a distinguished professor of marketing at Northeastern University in Boston.

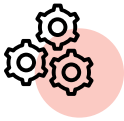
But complementing their marketing plans with SMS messages has its challenges for marketers. “The saying ‘with greater power comes greater responsibility’ is true when sending SMS messages,” Pauwels explains. “You have more responsibility to make your SMS messages relevant and give your customers the tools to manage the relationship.”

HIGHLIGHTS

Many organizations have found that the **best way to communicate with their customers** now is by sending them **SMS text messages alerting them to promotional and transactional information** in a quick, simple, time-sensitive, and personal way.

When done right, having **SMS and email marketing work cohesively together** can pack a punch and lead to better business outcomes such as **higher sales and revenues** and **increased customer loyalty**.

The best way to achieve trust with customers is to **be very clear with them about what they are signing up for when they opt in** to receive both SMS and email messages.



“The saying ‘with greater power comes greater responsibility’ is true when sending SMS messages. You have more responsibility to make your SMS messages relevant and give your customers the tools to manage the relationship,” says Koen Pauwels, a distinguished professor of marketing at Northeastern University.

Marketers must strike a delicate balance when sending messages to their customers. On the one hand, they must make sure that their SMS and email message strategies are aligned, and, on the other hand, they need to figure out the best practices for drafting winning SMS messages without overwhelming their customers’ inboxes. Marketers also have to measure the effectiveness of SMS messages, stay in compliance with strict rules and regulations when sending them, follow proper privacy protocols, and make it easy for customers to unsubscribe, or opt out, when it comes to receiving the messages.

Midsized companies such as jewelry store Joyeria Daisy have discovered that an automated, multichannel approach enables them to personalize their messaging at scale. Joyeria Daisy, which specializes in gold jewelry and is based in Rio Grande City, Texas, sends out both email and SMS messages to customers and has seen its revenue increase as a result, says the company’s digital marketing director, Roland Hernandez.

“Because we are a family business, we always try to make sure that every person gets a personal touch, even in mass marketing,” he says. “We are able to personalize messages with first and last names, but at the same time we are careful that our messages don’t sound too robotic, pitchy, or salesy.”

This report will explore how the use of both SMS and email marketing can help boost engagement with customers at scale, increase retail traffic, and promote customer loyalty and trust. It will examine the hurdles organizations need to overcome to engage in this way and how some companies are cohesively personalizing their messaging through technology to drive incrementally better revenue and sales while increasing lifetime value with their customers.

The Benefits of SMS Marketing

Email marketing has been a really popular and effective channel for marketers because of its high rate of return, its ability to increase traffic to a company’s website, and the boost it provides to brand awareness, especially when it comes to new customers. Email marketing doesn’t cost a lot of money, but it can bring a lot of revenue. Roughly 50% of the world’s population uses email, and email marketing has a 3,600% ROI,

according to data provided by EmailToolTester.³ Adding SMS marketing to an email marketing strategy offers companies the ability to connect with their customers directly and in a timely fashion. It can also spark conversations between a company and its customers, which helps strengthen relationships and increases customer loyalty and trust, and it boasts a much higher open rate for its messages.

As a result, companies have found that when they utilize SMS messages to communicate with their customers at scale, it’s best to keep their long-format and image-heavy messages to their email campaigns and leave their text messages short, sweet, and to the point. Mid-market companies should include a call to action in their SMS messages to grab their customers’ attention, as well as a link so they have a way to track the click-through rate from their text messages.

“We’ve done a little bit of everything, but we have found that it’s best to keep the SMS messages nice and short and add a link to a specific landing page,” Hernandez says. “Adding emojis to the message helps to lighten up the mood.”

Joyeria Daisy has found the call-to-action approach in SMS messages to be an effective way to communicate with its customers about payments and account information, since it allows them to personalize the message with financing information, such as how many more days they have to use approved financing, Hernandez says. He notes that what makes the company unique is that it offers a lot of payment assistance opportunities to its customers.

“Since we offer financing and leasing to our customers, we needed an extra level of communication with our customers to make sure that payments are made on time, but also to let them know about any specials that we have. Some of the major benefits that we’ve had from adding SMS messages to our business is the communication,” Hernandez says. “Adding SMS messages was important to us for the fact that we wanted to have a conversation with our customers.”

He explains that Joyeria Daisy uses its SMS messages as a call to action to customers on transactional and promotional matters, so it will send customers tracking information about an order, alert them if a product they are interested in is back in stock, and provide details about financing they have applied for.

When dealing with its customers through SMS messages, Joyeria Daisy is employing “conversational commerce,” which is the use of messaging apps to facilitate shopping and customer service transactions. Through this method, customers responding to an SMS marketing message trigger a protocol so the respondent gets a reply from the store that tells them someone will be with them shortly and asks their preferred language for any ensuing conversation. Hernandez says the company will assign the respondent to a sales associate, who will then take over the messaging.

“Sending out email newsletters is great, but we didn’t have the communication from newsletters that is vital for our business of selling,” he explains. “Once we added SMS messages, we noted that people were more communicative with us.”



“Sending out email newsletters is great, but we didn’t have the communication from newsletters that is vital for our business of selling. Once we added SMS messages, we noted that people were more communicative with us,” says Roland Hernandez, digital marketing director for Joyeria Daisy.

Overcoming SMS Marketing Roadblocks

But for Joyeria Daisy and other midsize companies looking to add SMS messaging to their marketing channels, there are bumps in the road. Often companies juggle multiple platforms for email and SMS, making it tricky to give customers a cohesive experience and accurately measure the effectiveness of their messages. It can also be a challenge to figure out the best practices for drafting successful SMS messages because it’s difficult to both measure the effectiveness of an SMS message and follow proper privacy and compliance opt-ins and other rules and regulations. In fact, making it easy for customers to opt out of receiving the messages is paramount because of compliance requirements and maintaining trust with customers.

When Joyeria Daisy first started sending out SMS and email messages, the company was using several different platforms, which made providing a cohesive experience very challenging. At one point, the company had three different platforms—one that did well with transactional messages, one that worked well for mass text messages, and one that was best for its conversational messages. When the company was using different platforms, it proved to be a hassle for Joyeria Daisy, which had to contend with different logins, different types of software, and different types of designs for its messages. Joyeria Daisy also had to manually input customer information into the various platforms.

Before Joyeria Daisy had its email and SMS messages on the same platform, it found that the ability to connect its three platforms always had some sort of limitation, so the company could never be sure if the same people were getting the same message or if the messages were even being delivered. Now that the company has connected its SMS and email messages on the same platform, it is able to easily see that a customer has opened and responded to a message, all through the customer file. “It saves a lot of time, a lot of energy, and, ultimately, a lot of money, too,” Hernandez notes.

Once companies work through the initial challenges of sending text messages to their customers, they then face another challenge: getting customers to agree to receive SMS messages and keeping subscribers opted in so they continue to receive the messages.

Joyeria Daisy has been able to use technology to its advantage to amass a client list for email and SMS messages when customers visit the store and make a purchase. During the purchase process, sales associates are also getting the customers’ email information and phone numbers, and then asking them to opt in to receive messages. All the information is stored in Joyeria Daisy’s customized point-of-sale system. The company also asks customers to opt in to receive messages when they visit the retailer’s website, Hernandez says.

Meanwhile, High Caliber Karting and Entertainment has had success getting people to opt in to receive its messages through the waivers that people sign to participate in the entertainment at its Okemos, Mich. indoor go-kart facility. The company has also had opt-in success by posting a pop-up message on its website and through giveaways at public events, where people can scan a QR code and share their information in order to enter a raffle. In addition, the company gives customers the chance to sign up to receive its SMS messages through its weekly email newsletter.

Joyeria Daisy’s Hernandez notes that discouraging people from unsubscribing from messages and choosing to opt out “is the name of the game.” But he has found that having a calendar on the platform to keep track of the messages he was sending helped with monitoring the company’s unsubscribe rate. While the company still gets customers opting out, it is generally seeing that people like to stay subscribed to messages at least through the duration of their jewelry financing agreement.

Even if customers opt in, companies have to meet delivery guidelines. When Joyeria Daisy started sending

SMS messages to its customers three years ago, it needed to make sure that it was meeting all the proper guidelines with the Federal Communications Commission (FCC) to guarantee its messages would be delivered and wouldn't be blocked as spam. Hernandez explains that when it first started sending out SMS messages, the deliverability rate was anywhere from 40% to 60% as the company worked to meet the FCC guidelines for its messages. It also found that if it added images to its SMS messages, the deliverability rate went way down, since a lot of mobile phone carriers don't accept images.

Other delivery issues can surface, too, that have nothing to do with FCC guidelines. For example, Joyeria Daisy found that if it sent out SMS messages using a short code five-digit messaging number, it didn't get any replies. But if the company sent out long code seven-digit messaging numbers from a local area code, it would get replies from its customers because they felt that the message was being sent from a local person, and they could trust it because wasn't just spam. Joyeria Daisy discovered its customers felt that the short code SMS messages were spam and untrustworthy.

Hernandez says that when Joyeria Daisy first started sending out SMS messages, figuring out its optimal approach was overwhelming, especially given the character count limitation. He notes that the jewelry operation needed to make sure its messages were clear and concise.

While embarking on its SMS message journey with its customers, High Caliber has found it difficult to measure the success of its SMS marketing because customers don't often purchase online before coming to the company's facility. They pay for entry when they arrive at the track. According to Jacki Krumnow, the marketing director and master of mischief at High Caliber, the company's text messages always include a call to action and a link so that she can track the click-through of the message with the link.

Difficulty tracking the customer journey when it comes to mobile marketing isn't uncommon. Forty percent of the 316 marketing leaders at for-profit U.S. companies responding to The CMO Survey's September 2023 survey sponsored by Deloitte LLP, Duke University's Fuqua School of Business, and the American Marketing Association say they have difficulty tracking the customer across their mobile journey. **FIGURE 1** Meanwhile, 30.7% say another thing that limits the success of their mobile marketing is that their content isn't sufficiently personalized—something SMS marketing is supposed to address.⁴ The survey respondents for The CMO Survey were from various industries, including technology, banking, finance and insurance, manufacturing, consumer packaged goods, retail, health care, energy, and others.

Since a major challenge for companies is measuring the success of their messages, it helps to do A/B testing to fine-tune messages before a company begins to send them out, says Northeastern's Pauwels. He says it's also a good idea to

FIGURE 1

The Elusive Mobile Customer

Mobile marketers have the most trouble tracking the customer journey

Which of the following activities limit the success of your company's mobile marketing activities?



Source: The CMO Survey, September 2023

include a link in the message—something that High Caliber is doing—so companies can see how effective they are in ultimately leading to sales and so they have data to be able to compare to other media messaging.

Cohesive Coordination

Given the benefits of SMS marketing, working through the challenges of using it could pay dividends for marketers who want to pair it with email marketing. But teaming SMS and email marketing is a multipronged process, involving a cohesive approach to the pairing, an effort to build customer



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trust and loyalty, and a strategy for using artificial intelligence (AI) and other technologies.

When a company decides to add SMS messages to its marketing plan, it's important for its SMS and email marketing channels to work cohesively together for a variety of reasons. One reason is that marketers don't want customers to receive conflicting information. Another reason is that marketers need to cater to their customers' wishes. Some customers will prefer being contacted via email, but others will favor text messages, so organizations need to utilize both options to best stay in touch with all their customers, whatever their preference.

"Emails are best used for very general promotions, while text messages are best used for more urgent information, such as a deal happening that day, because customers are more likely to read it in time. Text messages are also well-suited for communicating with customers about something important, when you already have an established relationship with that customer, such as upcoming appointment reminders," says Pauwels.

High Caliber's target audience is people who are generally on their cell phones, given that its biggest demographic is people in their late teens and early 20s and their customers are roughly 60% male, so it made sense for the company to add SMS messages to its marketing strategy in July 2023.

High Caliber's Krumnow notes that it sends out a weekly email campaign but also likes to send text messages about once or twice a month when it has an announcement for something coming up, such as an event or an improvement to its facility. The company, which boasts 3,000 SMS and 56,000 email subscribers, has an email open rate of roughly 40% and finds that people prefer email messages that contain mostly images of what has been happening at the go-karting facility and advertisements for upcoming events, such as trivia, karaoke, and other monthly events.

High Caliber has learned to cast a wider net when it comes to its text messages and not just offer discounts to its SMS subscribers. It has started to see success with its text messages, including one SMS that saw a 14% click-through. That high click-through rate was for a message reminding people that summer was almost over and to come and have some fun before it ended, utilizing emojis to express the sadness their panda mascot was feeling about the season change. The next-highest click-through rate of 11% was a message letting customers know that High Caliber was expanding and upgrading their arcade.

Up next for High Caliber's SMS strategies is to work in automated messages, such as one welcoming a customer who signs up to receive email and text messages, and to figure out the kinks in the workflow of sending messages. It is also testing messages using AI-generated subject lines versus ones written by Krumnow herself, to see which are more successful. Krumnow said that the company hopes to



"We can definitely see an improvement in our revenue, and we attribute it to the fact that we are sending out more emails, but we are also sending out even more text messages, and messages that are more tailored to our clientele, as well," Hernandez explains.

gather at least six months of data on sending out email and SMS messages to its customers in order to set goals and KPIs on what it hopes to achieve moving forward.

Joyeria Daisy saw fairly quick results when it undertook a cohesive SMS and email marketing approach focused on relevance. "We can definitely see an improvement in our revenue, and we attribute it to the fact that we are sending out more emails, but we are also sending out even more text messages, and messages that are more tailored to our clientele, as well," Hernandez explains.

During two weekends in October 2023, the jewelry store ran a promotion for its customized chino link chain bracelet and chain necklace for 10% off and a free nameplate, both in a text message and in an email. From both messages combined over the course of the two weekends, the company saw over \$7,000 in sales on the website and in stores. It advertised the sale in both SMS and email messages during the first weekend, and the campaign ran as only a text message during the second weekend.

"This two-pronged approach provided us with a clear insight: SMS was the definitive leader in driving conversions," Hernandez explained. "This experience underscored the power of direct and personalized SMS communication in engaging our customers and driving sales, affirming my belief in the efficacy of tailored, technology-facilitated marketing strategies to not only meet but exceed our business objectives."

He said that previously the company ran campaigns just with emails, but now that it runs them with email and SMS messages side by side, "We see quite a bit more action on our website, get more phone calls and increased traffic in our store."

In the future, the company hopes to make its email and SMS messages even more cohesive by sending email messages without a lot of images that read more like text messages.



“Being as frank and honest as possible is good for your long-term relationship with your customers. People understand how commerce works and they understand that you ultimately want them to spend money with you, so it’s best to be open and frank about what your message is trying to achieve,” says Pauwels.

“Our SMS messages have had success being more conversational,” Hernandez says. “If we use that same approach for our emails, I think we could definitely see more cohesiveness between the both of them, instead of it just being different channels that people check.”

Building Customer Loyalty and Trust

SMS and email messages can help build a relationship between a company and its customers. But like all relationships, it must be built on trust, and trust is necessary to build brand loyalty. The best way to achieve trust with customers when mobile marketing is involved is to be very clear with them about what they are signing up for when they opt in to receive both SMS and email messages. Companies have found that they must tell their customers how many messages they can expect to receive, and then they need to stick to that limit in order to be authentic. At the same time, marketers also need to give customers a chance to easily opt out and make sure that they don’t annoy their customers by sending them too many messages.

“SMS messages can increase engagement and affection toward a company, as long as it’s not abused,” says Pauwels. “The more intimate and intrusive something is, the more you have to ensure that consumers won’t be upset by it, so it’s best to do a pilot test on employees at the company before sending anything out to customers.”

High Caliber has found that if it’s upfront with its customers about how often it will message them and then ensures that it isn’t sending them too many messages, the combined effort builds trust and loyalty with its customers.

“Having trust is very important,” Krumnow says. “I have gotten feedback from people who get our emails that say that they love that we only send an email once a week, so we are not inundating them with a whole bunch of things all of the time like a lot of places do. We email them every Friday and if we send out a text message, we do it on Fridays because it’s payday and that is when people are going to be most likely to come out.”

Throughout High Caliber’s marketing efforts, including those to get people to sign up to receive SMS and email

messages, the company promises that it will only text them once or twice a month. “We tell them what they are signing up for and that transparency is really important,” Krumnow adds.

One area High Caliber has targeted for increased use of text messaging is customer return visits. The company, which has been operating for three years, has found that most customers visit about once every eight months, and the entertainment company has been able to use text messages to remind people that it has events going on or has recently pushed out a discount, Krumnow explains.

Joyeria Daisy, too, has stated that one of its major goals for 2023 was to increase its repeat business. The company’s use of SMS and email messages has helped it meet that goal; the jewelry store’s repeat customer rate increased to 2.9% in 2023 from 1.75% in 2022, Hernandez reports.

Pauwels notes that sending call-to-action SMS messages is ideal for customers who already know and trust you. “Being as frank and honest as possible is good for your long-term relationship with your customers,” he says. “People understand how commerce works and they understand that you ultimately want them to spend money with you, so it’s best to be open and frank about what your message is trying to achieve.”

Marketers Turn to Technology for Help

Establishing customer trust and a cohesive approach to teaming SMS and email marketing only goes so far if marketers can’t personalize the content that’s being sent to customers. Enter AI and other technologies to help with personalization. Despite all the hype surrounding AI, it’s only recently that the technology has gained traction with marketers. According to The CMO Survey, 94.1% of marketers have begun to leverage the technology in the past three years, while 60.4% of respondents have used it for less than one year. Marketers who are integrating AI into their marketing organizations are using it for content personalization (52.8%) and content creation (49.2%), among other things.⁵

“AI is wonderful and helps to automate messages,” says Pauwels. “AI is really good at coming up with proposed messages to send and tweaking messages to use in an



“The best practice is to consider where consumers are in their decision journey and then figure out how SMS versus other tools that you have best fit into that journey,” says Pauwels.

experiment, but since this is a more intimate way to contact customers, a human needs to be involved to ensure that the messages ‘pass the smell test’ that machines are still not able to fully provide.”

High Caliber uses OpenAI’s language model ChatGPT, which generates human-like text based on prompts, when the company needs to expand its blogs and for shorter content when it needs a quick turnaround, Krumnow explains. Meanwhile, Joyeria Daisy has used AI to create different messages for A/B testing to help the jewelry store figure out which messages are most effective. But Hernandez notes that it mainly wants to use AI to track its inventory, since the company has unique SKUs for each of the items that it sells.

AI isn’t the only technology that is helpful to organizations for SMS and email marketing messages. Companies are also utilizing technologies to help keep an accurate database of their customers who have opted in to receive messages, along with their contact information. Technologies such as SMS and email automation and personalization software, along with AI, are being used to automate and personalize the messages companies are sending.

Conclusion

There are many reasons why it’s worthwhile for a company to add SMS messages to their email marketing plans. Besides SMS messaging’s potential to boost revenue and sales, drive traffic to an organization’s website, and increase brand awareness, companies have found that it can also help build brand trust and loyalty.

There are challenges that need to be overcome when adding SMS messages to an email marketing channel, however, such as figuring out the best way to craft a winning message, working out the kinks on deliverability of the messages, and being careful to meet all of the regulatory requirements for sending out these more intimate messages to consumers. It can also be challenging to track the success of messages and the customers’ journey once they receive a message.

But these barriers aren’t stopping marketers, who have found that it’s a best practice to have their SMS messages work cohesively with the email messages that they are sending out. They are taking this approach to avoid customer confusion and ensure that they aren’t sending out too many messages and annoying their customers. Midsize companies have found that they have had the best outcomes when sending out short, simple, to-the-point call-to-action SMS messages alongside their longer-form emails to their customers. Companies are also utilizing technology to help personalize, automate, and craft messages to their customers to save time and make sure that their messages are best positioned to win over their customers.

“Companies should ask themselves what they ultimately want to achieve—whether it’s getting more people aware of their brand, getting more people to buy products, or creating more loyalty and affection towards its brand—and then look at their whole arsenal of marketing tools and figure out where do SMS messages fit in to achieving its goals,” Pauwels says. “The best practice is to consider where consumers are in their decision journey and then figure out how SMS versus other tools that you have best fit into that journey.”

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