

mogli™

How We Make Texting Easy on Salesforce

Discover why thousands of Salesforce users trust **Mogli** with all their texting needs.

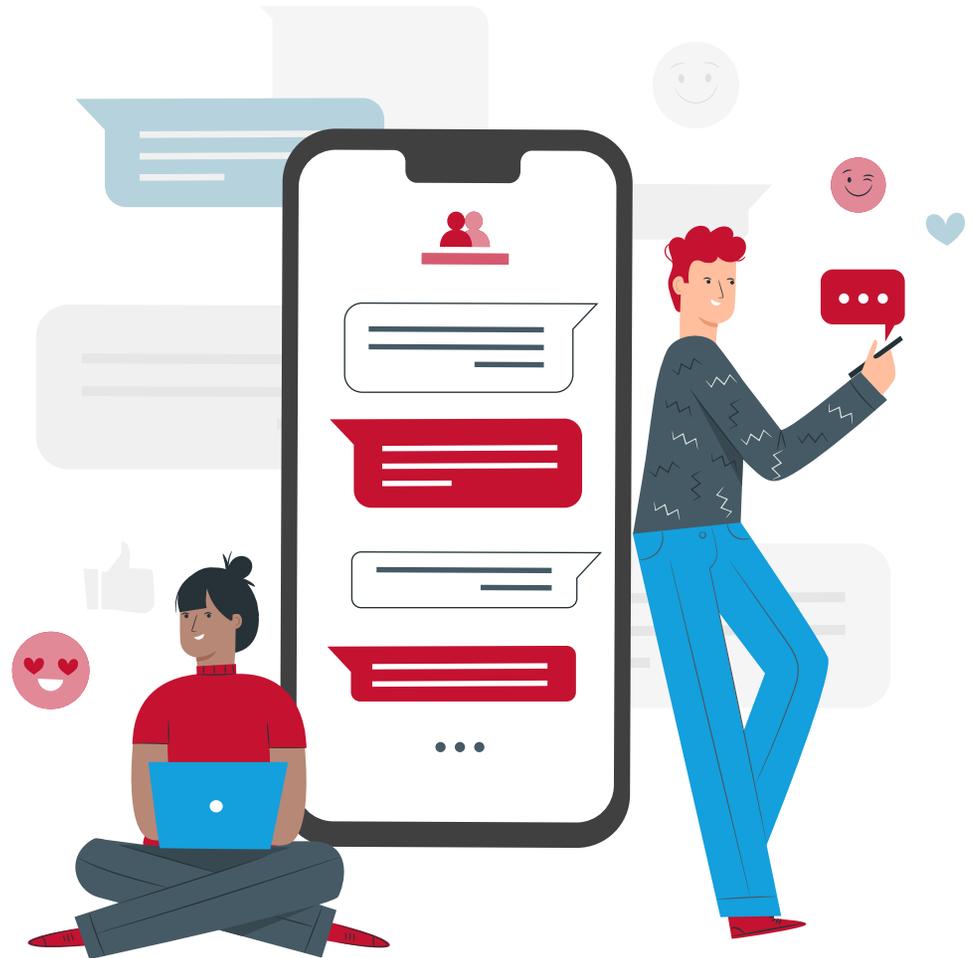


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SECTION 1:

Introduction

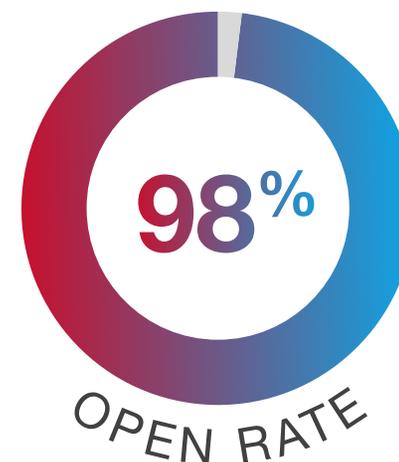
**We believe
texting from
Salesforce
should be easy.**

And that means all of it—registering your number, sending and receiving messages, tracking conversations, analyzing performance, and integrating text messages into any communication cadence where it can drive value.

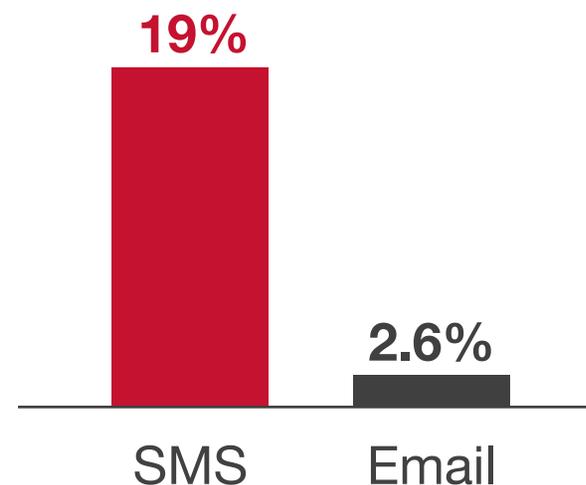
That's why we designed **Mogli**, a texting app built on and built for Salesforce, that anyone familiar with Salesforce can use.

Texting from Salesforce is difficult to do out of the box. The platform's SMS functionality is severely limited, and you have to navigate the process of registering your phone numbers on your own.

But with text messages' impressive 98% open rate and 19% click-through rate (compared to email's 2.6%), it's a highly valuable channel you want to get right. **You need a tool you can trust to deliver texts exactly to your specifications, directly from Salesforce.** That's where we come in.

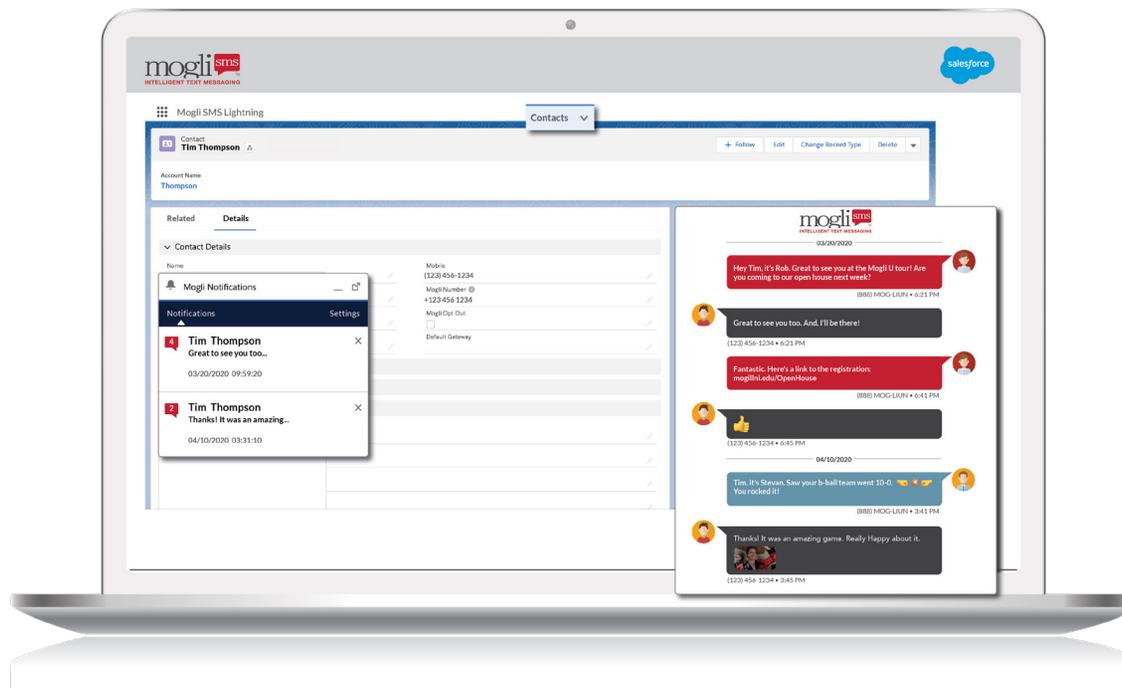


Click-Through Rates



Mogli is built on Salesforce, for Salesforce, and powered by a team of real text messaging experts.

- **Built on and for Salesforce:** Our app works inside of Salesforce, taking full advantage of the functionalities you already know and love.
- **Specially designed for texting:** text messaging is our sole priority. Every aspect of Mogli is designed to help you craft and send messages efficiently.
- **Experience you can trust:** We've been working with Salesforce for decades, so we understand the nuances and how to make them work for you.



SECTION 2:

Common Challenges

We've seen how hard it can be for businesses to navigate Salesforce texting on their own, and we're here to help.

We developed Mogli so any Salesforce user can send texts directly from their org—without all the hassle.



If you're struggling with...

Limited texting functionality



You can do only so much with Salesforce's SMS capabilities or off-platform texting solutions. Even if you invest in an SMS app with extensive features that can connect to Salesforce, you may have to build out and connect additional APIs. Ultimately, this can lead to duplicate records, inconsistencies, difficulty automating messages, and plenty of lost time.

Mogli, on the other hand, keeps everything in Salesforce to boost productivity and facilitate adoption, while providing extensive functionality. You get all the texting features you need, and you can easily create customizations and automated processes directly within Salesforce.

Confusing carrier registration & compliance



Application-to-Person (A2P) messaging is heavily regulated, and carriers tightly enforce their requirements. We know the challenges you encounter when you go to register your brand with carriers and the ongoing need to keep up with their requirements on top of your day-to-day responsibilities—so we provide help and guidance throughout.

Our onboarding team walks you through every step of the carrier registration process to make it as easy as possible to start texting. We talk to the carriers, decipher their requirements, and provide guidance to help you comply with changing regulations.



Continuity within Salesforce

Using an off-platform SMS solution creates data silos and needless difficulties for your team. Mogli provides connectivity throughout the ecosystem—your team can text from Marketing Cloud and see it from Sales Cloud. Text from anywhere in Salesforce and access everything from one central location.

Not only that, but since Mogli is built on Salesforce, your team doesn't have to waste time learning an entirely new platform just to text.



Complexities & nuances of SMS regulations

There's a whole world of SMS regulations—texting as a business is more complex than many people realize, and most teams don't have the resources to keep up with changes once they start texting.

When you work with Mogli, our team stays dialed in so you are always aware of the latest changes to laws and carrier requirements. SMS and WhatsApp messaging with Salesforce is our specialty, so we'll keep you up-to-date and break down exactly what you have to do to stay compliant. We give you robust functionality while also keeping our finger on the pulse of the ever-changing regulations landscape.

...then **Mogli** is the solution.

With our built-on Salesforce app and team of text messaging experts, you won't have to worry about any of these common challenges. Instead, you can:

- Use the same Salesforce terminology, features, and functionality you're used to
- Work alongside experts in both Salesforce *and* text messaging
- Easily scale your text messaging strategy as your engagement needs grow

“Our organization looked at every SMS app out there, **but none came close to Mogli.**”

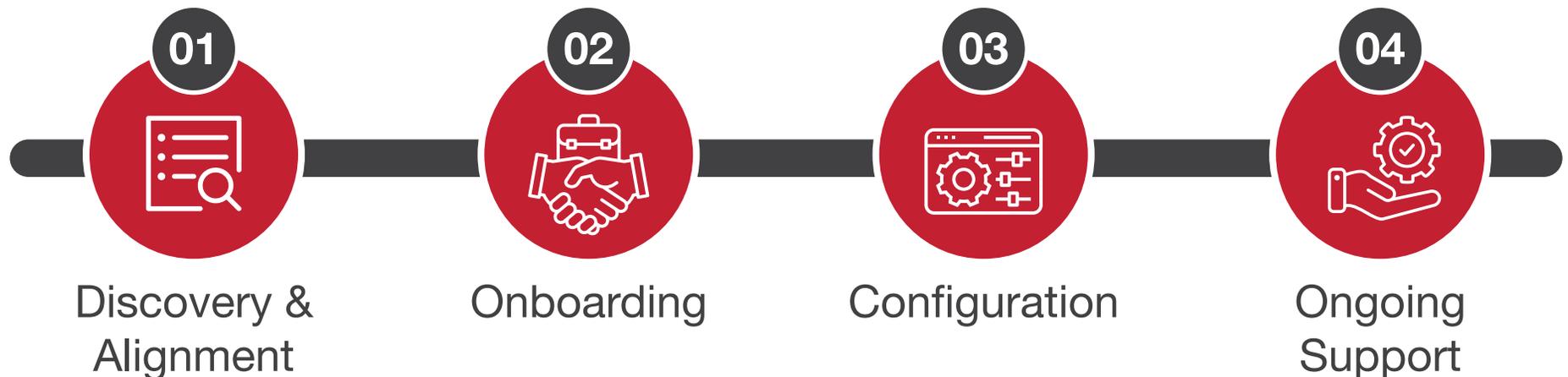
- Tony,
Chicago Scholars

SECTION 3:

Working with Mogli

What does it look like to work side-by-side with **Mogli's** team of experts?

Our team is here to make texting a breeze. Here's a quick breakdown of our process:



STEP 1:

Discovery & Alignment

First, you'll meet with a team member to discuss your goals, texting needs, and what we can do for you.

We'll gather information about how you use Salesforce and your ideal mobile engagement strategy. We know that every organization leverages Salesforce differently, so we work to understand how Mogli can best help you. Our team collaborates with you to clarify how many messages you might send, what kind of texts to prioritize, how many numbers you need, and more. We'll also collect details about your technical team, Salesforce experience, and history with SMS.

Then, we'll use this information to deliver a **custom demo built for your use case**. One of our team members will schedule a meeting to:

- Discuss your communication goals and other potential mobile engagement use cases.
- Ensure we fully understand your tech stack, business processes, data, and where texting makes sense.
- Help you choose a plan that fits your unique organizational needs, goals, and budget.
- Talk through additional priorities we can help with.

We help you discover the root of your use cases and visualize your stakeholder journey from start to finish with SMS.

STEP 2:

Onboarding

You're fully supported through carrier (number) registration, implementation, and setup—and everything is tailored to you.

Next, you'll be paired with an Onboarding Specialist who serves as your partner from day one. On a kickoff call, they'll outline the onboarding process and provide a personalized timeline based on your ideal go-live date. We also create a custom onboarding workbook with clear steps to streamline the process.

This is when we walk you through carrier registration, with our team leading the way. During this process, you will be actively supported for **carrier registration**—we collect information, verify accuracy, and work with the carriers for you. Here's a quick snapshot of what that looks like:

1. We gather details like your organization's legal name, EIN, business address, and vertical to register your brand with carriers.
2. Once you're approved, we explain what's needed for campaign registration and outline exactly who you plan to text.
3. We collect sample messages that accurately reflect the types of content you'll send.
4. Our experts work with you to update your privacy policy and SMS terms of use to ensure carrier compliance.
5. We send off your policies, terms, and opt-in consent guidelines to the carriers to register your campaign.

We understand you want to start texting as soon as possible, and our team is here to facilitate every step of that process.

“The level of expert care and attention we’ve received from the entire Mogli team has been outstanding, and we are truly grateful for their partnership in helping us achieve our goals.”

**- Terri L.
Modern Classrooms
Project**



STEP 3:

Configuration

Our onboarding team streamlines implementation, ensuring Mogli works exactly as you need it to.

While carriers review and approve your registration, we get the ball rolling on implementation. Our team will get acquainted with your unique Salesforce environment, uncovering the details of your configuration and how you want Mogli to function within your org.

Then, we'll create a sandbox configuration and test gateway, eventually moving into a production org that we iterate on using your feedback.

Once the registration process is complete, we can put your live numbers into production! We'll make sure everything in Salesforce is clean and functional. At this point, we'll also ask if you want to make any changes and tap in our professional services team as needed. If you need additional support, we're always happy to connect you with other experts who can help.

Everyone at Mogli is a Salesforce expert, so you can rest assured you have support from a team of trusted, capable people.

STEP 4:

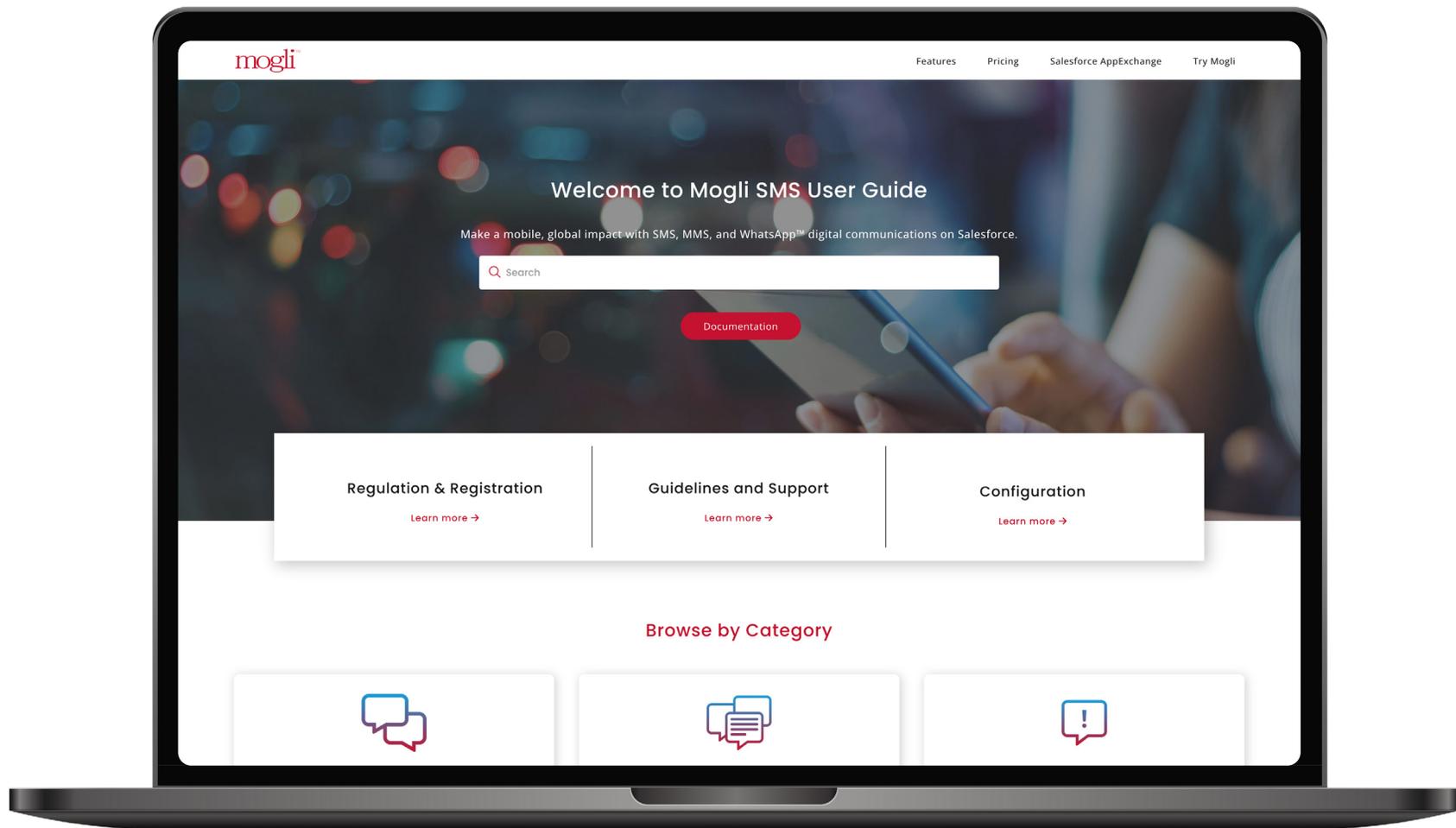
Ongoing Training and Support

As long as you use Mogli, you have the backing of our expert, fully U.S.-based support team.

During onboarding, you'll receive at least two training sessions to ensure you can use Mogli to its full potential. Most clients come out of the implementation process feeling confident and ready to start texting, but if you need more support, we're always here to help. Our 100% U.S.-based support team can handle any issues, questions, new configurations, custom object configurations, and more.

Every Mogli client gets access to the following resources:

- **Responsive technical support:** Any time you need help, you can email help@mogli.com and get a quick response from our support team. Support tickets receive a rapid response—*always* from a real person, within the U.S.
- **A designated Account Manager:** Your Account Manager is here to champion your success with Mogli. They'll facilitate your Mogli journey, check in on your experience, and provide a tailored annual business review to review your past year's results using text messaging and roadmap your path to scale.
- **Our full library of user guides:** Mogli users have access to a library of resources, user guides, and documentation you can explore at any time. Browse guidance on carrier regulations, Salesforce configuration, the latest releases, and more



We work alongside our clients to help them scale and reach maximum efficiency. Whatever you need, we're here to help.

“The partnership has been one of the best vendor relationships I’ve had, thanks to their responsiveness and thoughtful implementation. Despite our unique needs and custom requirements, Mogli did a fantastic job.”

- Matt P.
Fortune 500 Telecommunications Company



SECTION 4:

Why Choose Mogli?

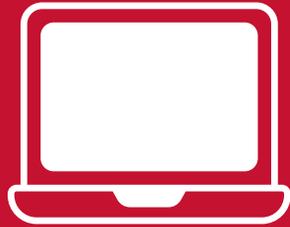
We don't just *think*
Mogli is the easiest
way to text from
Salesforce — we
know it is.

Here's what makes our
built on, built for Salesforce
solution the #1 option,
hands-down.



**Explore the
Mogli difference:
our people,
technology, and
close ties with
Salesforce.**





Built on Salesforce, for Salesforce

You want your team to be in Salesforce 24/7 to maximize efficiency, and Mogli lets you do that. There's no toggling between tabs, importing data, or relying on other servers. As long as Salesforce is up and running, Mogli is too. You don't have to connect to a backend or worry about data security, either.

Plus, you don't have to "learn" Mogli since you already know how to use Salesforce. Use your regular reporting process, leverage Flow, and build automations just like you would for any other Salesforce application—it's that easy. **Anything you can do with Salesforce, you can do with Mogli.**

What you really get with Mogli is the multiplier of everything that Salesforce can do. The possibilities are endless—you can tie a text message to any existing business process or communication cadence. Our app makes it easy for texts to be part of *any* organizational need or process.



Tailored onboarding experience makes adoption as easy as possible

Adding a text messaging (SMS or WhatsApp) app to your tech stack can be challenging to navigate on your own. That's why our onboarding experience is so valuable. **Our support is unmatched compared to the DIY approach or working with other providers.** We offer individualized guidance and technical expertise every step of the way.

Our team members do more than implement our software—they help you maximize your investment in Mogli. This includes helping with your use cases, identifying the best places to integrate text messaging, developing carrier-compliant policies to get registered quickly, and much more.



All team members are high-level Salesforce experts

Using an off-platform solution means that support teams may not have a nuanced understanding of the platform you rely on. **At Mogli, all our team members know Salesforce, putting us in the best possible position to help your organization succeed.**

We've been a Salesforce Partner since 2011, and we're experts in every sense of the word—our team stays up-to-date on Salesforce, gateway registrations, compliance, carrier requirements, *and* industry best practices.

Run into issues or complications? We know how to work through them. Have questions about how to bring an idea to life? Our team can talk to your technical stakeholders and walk them through it. New to Salesforce yourself? No worries, we can help! Depending on your needs, we can connect you with the right resources, help you adapt, and even build out reports and dashboards.



**100% U.S.-based,
side-by-side
support team**

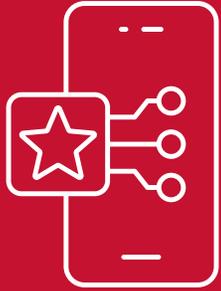
We take a consultative, hands-on approach to onboarding, training, and support. You'll have someone to go to at every stage in your Mogli journey, so you don't have to navigate any part of it alone. Our approach saves you valuable time, and ensures you have all the information and tools you need to comply with text messaging regulations.

Plus, our entire onboarding and support teams are based in the U.S., offering quick response times and coast-to-coast support. Just think about the impact on your bottom line if you have to wait days for a response—with Mogli, our team strives for efficient support ticket handling, leveraging the support capabilities of our highly capable people.



Unlimited user license

Most text messaging apps use a pricing structure that charges by the user, making it difficult and increasingly expensive for the platform to scale as your business grows. That's not the case with Mogli—**each of our plans comes with unlimited seats**. This means you get a site license for your entire Salesforce org, and every person with access gets complete access to Mogli (as long as you give them permission).



Extensive text messaging features, built to scale

Mogli is easy to scale, and we're developing new functionalities all the time, but our core features include:



Bulk & two-way texts



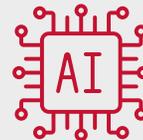
SMS, & WhatsApp



Automated messages



URL Tracking



Surveys & AI



Mobile based scheduling

Don't just take it from us—listen to what our clients say about their experiences with Mogli.

Explore more of our **5-star reviews** on the Salesforce [AppExchange](#).

“Mogli was so easy to onboard, it's simple to use, and it integrates seamlessly with Salesforce.”

- Heather R.,
Grove City College

“Mogli not only has all the powerhouse features but also the little ones that make an enormous difference to our users. It is obvious the software was designed with the user in mind.”

- Jeffrey B.,
Taylor University

Mogli is the “Obvious choice for a texting service that lives naturally in Salesforce.”

- Erik B.,
St. Cloud Technical and
Community College

“Their expertise in tailoring solutions to our specific needs and ensuring our success is priceless.”

- Leannetta M.,
Park University



The proof is in the data. Just check out the results Graymont Medical saw after implementing Mogli.

This medical equipment provider used Mogli to boost awareness of its lactation services for new moms. With SMS, they were able to quickly get through to their audience and achieve the following results:

700%  growth in service appointments

 **40%** survey completion rate

29  different SMS message templates

SECTION 5:

Conclusion

**Our built on
Salesforce tech
+ expert team
makes **texting from
Salesforce as easy
and limitless as it
should be.****



Other providers may enable you to send basic text messages, but you can do much more with Mogli. **When you combine our powerful, built on Salesforce technology with the smarts of our people, you'll unlock unlimited texting possibilities.**

Start your journey today and discover what you can make possible with Mogli.



Supercharge your SMS strategy with Mogli.

Contact our team of experts to learn how we can make texting easy and impactful for you.

[Schedule a demo today](#)

A graphic of a smartphone with a dark blue outline, positioned vertically on the right side of the image. The screen is white and displays the Mogli logo in a red, serif font. The logo consists of the word "mogli" in lowercase letters, with a small "TM" trademark symbol to the upper right of the "i".

mogli™