



A Harte-Hanks White Paper

Mobile Marketing

Marketers' Best Practice Guide to Text Messaging



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Mobile Marketing

Mobile marketing is no longer an emerging trend – it is one that is already here. Yet, many marketers are still contemplating how they should approach mobile in their organizations.

Mobile marketing includes the following elements: text messaging, multi-media messaging, mobile applications and mobile Web sites.

It may be fairly simple to create a text message program for customers, but like many things, it must be measured, have a proven return on investment and mobile information should be integrated into customer databases. Other complexities: offers may be different for mobile customers and it may be difficult to match mobile users to existing database records.

This white paper is a guide as to how to approach text messaging campaigns and programs, and follow best practices.

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Introduction

Text messaging, or SMS (Short Message Service), made its debut in 1992, and by 1995 had still not increased all that much. Outside of the US, SMS gained ground much faster. Europe, Asia, Australia, and other continents adopted the technology of mobile quickly, and text is considered the primary form of communication for many people around the world.

In the US today, SMS is coming of age. Nielsen Mobile reported that the average number of text messages per month for 18 to 34-year-olds increased from 138 to 845 between Q1 2006 and Q4 2009, and voice minutes decreased from 1,094 to 943.¹ It has been reported that daily text messaging of American teens has increased from 38% in February 2008 to 54% in September 2009.² Not only that, their volume is increasing – over 50% of teens send more than 50 text messages per day, or an average of 1,500 per month. A recent study from Tekelec showed that over 60% of people over the age of 45 were as likely to use text messaging as make a phone call.

The International Association for the Wireless Telecommunications Industry (CTIA) reported recently that Americans send 4.1 billion text messages annually. Frost & Sullivan reported recently that 98% of SMS messages are read. Many consumers read them nearly immediately, making the medium incredibly effective for marketers.

Over 276 million estimated mobile subscribers in the US, according to CTIA

But the wake-up call for marketers came when SMS campaigns started to generate dollars. Although many early campaigns were focused toward younger audiences, they generated extremely high response rates – it was not uncommon to see 50% to 60% redemption rates of mobile offers.

Meanwhile, the carriers (companies that sell cellular services) are dropping their rates and changing their plans to accommodate their customers, evolving usage of their mobile phones. Unlimited plans are fairly inexpensive today, although some carriers are creating levels of messaging plans rather than leaving themselves open to heavy SMS usage from a smaller percentage of customers.

¹ Nielsen Customer Value Metrics, 5/24/10 Nielsen Mobile

² Pew Internet & American Life Project, 4/2010, 2009 Parent-Teen Cell Phone Survey

All of this opportunity has not been created without some guidelines and regulations. Organizations such as the Mobile Marketing Association (MMA) have established guidelines to assist marketers monitored by the CTIA and by the wireless carriers.

The stage has been set – so what is preventing more marketers from integrating SMS into their marketing mix? Some are providing campaigns; others are jumping into mobile applications and mobile Web sites as their answer to mobile marketing. It seems likely that hesitation is coming from infrastructure challenges, and the investment required for SMS to be successful as a channel. It's not the cost of the messaging campaign – it's the supporting marketing to make it generate a positive return on investment (ROI).

What is an SMS Campaign?

SMS can be used in different ways within an organization. Text alerts can help customers remember to do certain things; SMS coupons can be delivered to a customer on their phone which is likely to be on their person when they visit a location. SMS can provide helpful information, such as notifications that products have been shipped or are being delivered, or letting a customer know their car is ready to be picked up after service.

Some real-life examples include:

- The ASPCA offers a pet care alert program, providing messages to dog or cat owners about pet care
- Women can sign up for text alerts to remind them to schedule their annual mammograms and screenings in a program sponsored by Sharsheret, in an effort to promote breast cancer awareness
- During the 2010 MTV Movie Awards, viewers were asked to vote by texting to a short code. Within the reply message, they had the chance to reply with a keyword to get a coupon for a Starbucks frappuccino, or click on a link to a mobile page, or click to call a phone number
- Hard Rock Café is using SMS to alert customers that its tables are ready
- Target launched a nationwide mobile program in March 2010, offering mobile coupons through mobile pages with bar codes, delivered to the customer through SMS

Like most marketing campaigns, strategy is the prerequisite to a successful campaign. Knowing the customers' needs and what would be relevant to them is a critical component of mobile.

A Strategy of Relevance

One of the biggest differences between traditional delivery of media and mobile phones lies within the device itself. Mobile devices are part of daily life – they go with consumers when they leave the house and they usually aren't far away even when they are home. The more complicated life is and the busier consumers are, the more connected they are. It is one of the reasons that consumers demand relevancy in the mobile messages they receive. The other is financial – consumers may be paying for each message being sent and they don't want things they don't care about.

Consider the email inbox. Over 90% of today's email is considered spam³. Anti-spam software removes some of the messages but many unwanted messages make it through the filter. Typical behavior is to delete or leave messages unread, but it has become part of the life of an Internet user. Consumers expect to receive unwanted messages – they may not be happy about it but the tolerance is lower because it is easy to remove or ignore the messages they don't want. Free services for email are easy to find and many people today take advantage of Webmail systems.

Now consider the mobile device. Text messages arrive on the phone, and many people are alerted to their presence by tones, pop-up messages, or both. The mobile device will continue to remind them of the message until it is opened or deleted. It may arrive at an inopportune time as well. Once the message is opened (and charged to the consumer's account), the consumer's expectation is that it's something they asked for and that it's relevant to their needs.

As marketers think through how SMS campaigns could assist their customers, marketers should resist the impulse to blast out unrelated messages. For one thing, the message may not be relevant based on what the consumer opted in for, but it's a risk for opt-out – which is very easy for a consumer to do. In most cases, marketers are authorized to notify subscribers (or opt-in consumers) about program updates, and retention messages can be sent related to that program. The guidelines of the carrier must be followed. For example, Verizon does not allow games; T-Mobile

³ Symantec, Message Labs Intelligence Report, May 2009

does not allow mobile gifting. To get the latest information on what is allowed by the carriers, visit the Mobile Marketing Association Web site⁴ and get its latest Best Practices for US Consumers document - <http://mmaglobal.com/policies/education>.

SMS campaigns should be simple for the consumer. Opt-in methods, or campaigns that require more than one or two proactive replies and messages by the consumer, will probably result in abandonment, unless there are compelling reasons for the consumer to continue. A recent example: one company had a mobile campaign that required the consumer to respond with four different pieces of information before they were considered "opted-in." Opt-in rates for the campaign were poor, given the usability of the process.

Marketers should be thinking about SMS campaigns that assist their customers, and how those messages could be valuable. Tying SMS into backend systems is one of those opportunities; marketers with inventory – whether it be managing reservations in a restaurant, hotel rooms that are empty, overstock of items that can be offered at a discount – are all real-time opportunities for SMS campaigns. Think about other aspects of the customer experience and tie SMS to notifications for in-store pick-up, new hot products launching, and available for sale, or even wait times for a ride at an amusement park.

Example: A recent text alert program notified interested users of the game times of the 2010 World Cup. Users could join by texting FIFA to the short code, and confirmed their opt-in to receive daily messaging (up to three times per day) with game times and the team schedule. The campaign lasted for one month, ending with a Thank You message from the sponsor, Hyundai Motor Company.⁵

Marketers should also consider how social media and mobile intersect. Social networking is the top content category for both applications and for the mobile Web.⁶ A significant behavioral change, social networks increased 240% on mobile applications and 90% on the mobile Web from just one year ago.

⁴ <http://www.mmaglobal.com>

⁵ Campaign strategy and delivery by Harte-Hanks

⁶ Comscore, MobiLens Service, June 2010

Short Codes

A common short code (CSC) or short code is a shortened phone number that can be used within a specific country, without using an area code. Short codes are five to six digit codes, although as short code popularity grows, it will grow to seven digits. Short codes are leased by US Short Codes, an organization that manages the registration and leasing of the codes. Learn more about short codes at <http://www.usshortcodes.com>.

Companies can obtain their own short code for their marketing efforts. They can request a unique code or a custom code (one the marketer requests specifically). Short codes must be applied for, using an application that identifies all of the types of potential marketing done on the code, such as SMS, polls, MMS (multimedia message service), ringtone or other content sales, downloads and more. The applications are then provided to each carrier that the marketer specifies – national and/or regional – for their approval. This process is somewhat lengthy given the volume of short codes being requested.

In the interim, the marketer can use a shared short code from a mobile marketing agency. These codes are pre-approved for various SMS services, and may be used by other companies at the same time.

Some marketers try to get customized codes that spell something, similar to 800 numbers in the past. Just remember that people with smart phones won't be able to spell the number, since they probably have a full keyboard and won't be able to press letters that associate to numbers.

Opt-In and Opt-Out Requirements

SMS Marketing is complex. The elements of opt-in and opt-out are like no other form of marketing, and must be followed. Some vendors may give false assurances about how consumers are opted in for messaging, but it's critical for marketers to understand the rules and who makes them.

There are no lists to purchase for mobile; you must build it yourself

Opt-In Process

SMS has two methods of opting in customers – through single or double opt-in; either way, the consumer has to willfully request the marketer to opt-in.

Single Opt-in: When a consumer requests information through texting to a short code (typically), and the marketer responds, it is considered a Single Opt-in, meaning that the consumer has made a single request.

Example 1: Consumer texts the number 20 to a short code to vote for contestant 20. The consumer receives a text message back that thanks him for his vote and links him to poll results.

Example 2: Consumer texts WIN to a short code to join a promotion during an event. The consumer receives a text message back asking her to come to the marketer's location at the event to get her prize.

Double Opt-in: *Recommended* for long-term messaging, the consumer requests the campaign content, the marketer responds by asking the consumer to confirm his intent, and the consumer replies with his consent. The initial request by the consumer can be made from a Web form or a mobile Web page, as well as by text messaging. The double opt-in can also be achieved through usage of a PIN number sent to the phone and then entered on a Web form. Double opt-in is *required* for any premium messaging services (meaning that the consumer will be charged for content either on a subscription or one-time basis).

Example 1: Consumer texts JOIN to a short code to join a coupon program. The marketer responds by asking the consumer to confirm and tells her how many messages she will receive. The consumer replies with YES. The marketer responds with the consumers' first coupon, or lets her know when she will receive her first message, and provides instructions on how to opt-out.

Example 2: Consumer texts JOIN to a short code to join a coupon program. The marketer responds with a message that contains a link to a mobile Web page where the consumer can sign-up for mobile coupons. After the consumer signs up on the page, the marketer triggers back a text message to the consumer, requesting the consumer to confirm the opt-in by replying with YES. Once the consumer does that, the marketer can reply with the first message and opt-out instructions. If the marketer can confirm this

user came from an SMS message, they may be able to avoid the second confirmation.

Example 3: The consumer sees a link or call-out to join the marketer's text program online or on the mobile Web. The consumer fills out the form. The marketer triggers a message to the consumer asking to confirm the opt-in by replying with YES. Once the consumer does that, the marketer can reply with the first message and opt-out instructions.

Example 4: The consumer opts-in from a Web form, and receives a PIN number on the phone (triggered by the Web/Mobile service). The consumer enters the PIN on the Web form, and then is considered opted in.

Opt-in to text messaging is often misunderstood. Marketers want to believe some vendors when they hear that they can proactively request people in their database to opt-in to text messaging using cell phone numbers they already have, or do a negative opt-in by informing the consumer they may opt-out if they don't want the message. But the truth is that marketers cannot do this. Organizations such as the MMA and CTIA, and specific regulations by the carriers have been created to protect consumers. As mentioned previously, email is quite different. A marketer is accustomed to buying lists and appending email addresses to extend their reach. However, consumers don't have to pay for email. Mobile messaging is being protected to prevent spam situations from occurring and to keep consumers happy with their carriers (remember who the consumer will likely complain to if they receive something they didn't ask for – their wireless carrier!) There are no lists to purchase, and it is not legal to sell your list.

Given recent successful lawsuits, based on consumer complaints, it is *recommended* to obtain a double opt-in for ongoing messaging – one that is proactively requested by the consumer – to ensure clear opt-in records, particularly when a mobile or Web form starts the process (one consumer could try to opt-in another consumer).

Opt-Out Process

The ease of opt-out in text messaging makes many marketers uneasy. One false move in messaging and the consumer is gone. Consumers may opt-out because they achieved their goal or are not using the coupons they are being sent. They may just be tired of seeing the message on their phone.

Universal opt-outs have been set by the carriers. Anyone should be able to text STOP to a short code and be opted out of that program. Additionally, marketers should support other keywords as well, including, END, CANCEL, UNSUBSCRIBE or QUIT. The marketer can return a confirmation message. The marketer may not send any further messages to that number.

Opt-out strategies should be created for shared short codes. The consumer may need to use a slightly different opt-out such as STOP1 to be removed from a specific campaign, or use the generic code to opt-out of all of them. In some cases, the marketer may want to return a text message with a menu of campaigns so that the consumer opts-out of the correct campaign. The consumer could reply with a campaign number to be opted-out at that time; when the consumer texts STOP ALL to a short code, it should opt-out the consumer from all programs on the short code.

Text Message Best Practices

Text messages are only 160 characters long. It's nearly an art form to get the message across within those confines, along with any other required messaging for opt-out or rate information. Additionally, marketers need to include elements about their programs to consumers, to make it simple to understand the program that has been signed up for and give an expectation of how many messages they will receive.

Some general best practices to remember:

Label the message. Consumers may not recognize the short code when they receive a text message, so make sure that the company is identified as the very first word in each message. Many marketers forget this and send out generic messages, which the consumer may not recognize.

Use abbreviations. Most marketers today are using abbreviations that are common to text messaging, such as Msg&Data Rates May Apply (Messaging and Data Rates May Apply), and plenty of other shortened versions. Just make sure that it's a common abbreviation.

Opt-out messaging. The opt-out may not need to be in each and every message but check with a mobile marketer expert. The Mobile Marketing Association recommends including the opt-out on a "regular basis."

Terms & conditions placement. Add a terms & condition statement to the corporate or brand Web site or mobile site to provide an easy link to

information. Include all of the information about the mobile campaign, including the number of messages, the type of content, a statement relating to messaging and data rates, and instructions on how to opt-out of the program.

Help messaging. All SMS programs require Help messaging. When the consumer texts HELP to the short code, a message should be returned with an explanation of the program or a link to another version, a phone number to contact a call center or an IVR system, or an email address. The HELP message should contain opt-out instructions.

Keep it simple. Keep text campaigns simple for customers. Don't ask them to text back and forth endlessly in the hopes of getting more data or to participate in the campaign – use mobile landing pages to capture information as an option.

How much is too much. Don't send messages too often. Just like other channels, the right message frequency is different for each type of customer and campaign. Give the control to consumers, if possible, and allow them to select their frequency. If that is not possible, be conservative when planning push messages.

Integrate messaging. Provide mobile as an option for consumers, but keep in mind that, moving forward, more people will choose mobile as their only channel.

Planning and Promoting Programs

Keyword Strategies

Keywords in SMS campaigns refer to the word(s) that consumers use to opt-in or respond in campaigns.

Example: The marketer asks the consumer to "Text JOIN to 12345." The keyword is JOIN, and the short code is 12345.

Keywords are often underappreciated in the value they bring to campaign tracking. Coming up with short and simple words are part of the best practices of SMS. But marketers should also consider the possibilities of keywords in their

Plan a keyword strategy that can make SMS campaigns trackable and provide insight into customer behavior.

campaigns. Think back to creating campaigns using custom 800 numbers, or coding PO Boxes for catalog advertisements. Then think about the keyword strategy again.

Keywords can indicate locations, allowing a retailer to use specialized keywords at their stores to track mobile usage. Keywords can indicate advertising efforts, tracking where call-outs to SMS message campaigns are the most effective – on Facebook, in banners, on billboards.

Every message within an SMS campaign has a keyword associated to it, on the backend of the mobile platform. Be creative and use call-to-action words to get consumers to take action.

Promoting the SMS Campaign

The obligation to the consumer starts when the SMS program is advertised. Marketers need to ensure that consumers understand what they are signing up for, to avoid having issues later on. Provide a keyword to use to text to a short code to join a program, or provide a link to an online or mobile Web form to enroll.

Include instructions on how to enroll, tell them what they are enrolling for (coupons, information, alerts, etc.), how many messages they will receive (for example, no more than five messages per month), how to get help (text HELP to the short code), how to opt-out (text STOP to quit), what the carrier costs might be (Msg&Data Rates May Apply), and the location of the terms & conditions (T&C available at [site.com/tandc](#)).

One of the things to keep in mind is that mobile campaigns are only as effective as the marketing effort put behind them. Approaching mobile from a multi-channel perspective means that the marketer provides mobile messages as an option to consumers who wish to engage that way, and it means that marketer's support mobile programs through all of their channels.

In-store signage is critical when brick and mortar locations are involved. Put signs at the cash register, on the walls and in the windows. Give consumers a reason to enroll – make sure they know there is value and reap the rewards.

Add mobile call-outs to social network pages, to emails, direct mail, catalogs and circulars. Invite customers to enroll in mobile programs directly – don't just include it as an option on the page or communication.

Mobile Coupons

Mobile coupons are growing quickly, and the redemption rates are much higher than other traditional forms of advertising. Remember that mobile is the delivery device – people have their phones with them when they enter locations, and only need to be reminded to use them. In-store signage helps with the redemption part, too!

Over 44% of US marketers who used mobile tactics in 2009 tested mobile coupons to their customers⁷, and over 50% of US marketers planned to test mobile coupons during the next 12 months (2010).

Mobile coupons can be delivered in several different ways, and will more than likely continue to evolve as phone technology improves along with in-store and point-of-sale (POS) systems.

Mobile coupons can deliver a generic coupon code, similar to ones used on eCommerce Web sites today. The generic code can be entered by the cashier at POS if possible. The issue is that many retailers today still do not have an easy way to enter a generic code. Also, many marketers reject generic codes as they can easily end up on coupon sites, or get abused by the consumer.

Mobile coupons can deliver customized codes for the consumer that can only be used one time. The codes can be dynamically created for the customer, but will require that the customer information is collected at opt-in.

Mobile coupons can also be delivered through mobile Web pages, using bar codes. The POS system will need to be able to scan the bar codes, which can be problematic depending on the age and type of scanner. This method can safely deliver a customized code, with limited usage, and can use an SMS message to deliver the link to the consumer.

The mobile coupon challenge comes down to data – identifying the customer who is opting-in for messaging, and capturing the redemption at checkout in a way that tracks back to that customer.

New technologies will give mobile coupons even more relevance; retailers should look at Geo-Fencing or Geographic Messaging Service (GMS). This technology will allow marketers to target consumers when entering their physical locations and serve messages to opted-in subscribers.

⁷ Forrester Research, Best Practices in Mobile Marketing 8/09

Mobile and the Database

The customer database usually serves as a repository when creating and managing marketing campaigns – email, direct mail, phone and now, mobile. Database fields must accommodate SMS opt-ins and opt-outs for various programs, as well as mobile application and mobile Web components.

Another unique aspect of mobile marketing is the immediacy of opt-out. Special care will be needed to ensure that the most current list of opt-ins is pulled when sending out messages. Since many mobile programs are trigger-based, the mobile database or data-mart may manage campaigns more effectively, making the customer database the complete record after-the-fact.

When customers opt-in to mobile through SMS keywords, marketers may look for ways to identify a customer. The database may be able to provide some matching elements to help identify customers, by asking customers to provide their names, email addresses or customer IDs. However, text is not a perfect medium and many people misspell or abbreviate words by habit when texting. They also may not enter the same identifying information that is in the database, and may not bother with a customer ID if it's not easy to access. Systems could be built to match, and return a text message response to a consumer through text if it does not match and ask them to try again, but that may lead to consumer frustration.

The Mobile Web and Mobile Applications

Mobile applications and the Mobile Web are both important components to SMS campaigns. SMS can drive traffic to both of these engaging mobile channels, providing even more value to the consumer. And SMS can be a component of applications and mobile Web sites, providing alerts or other valuable consumer information.

The Mobile Web

Smart phone usage continues to grow; Nielsen Mobile predicts that by the end of 2011, smartphones will begin to overtake feature phones in the marketplace, and 45% of respondents to a Nielsen survey

By the end of 2011,
smartphones will overtake
feature phones in the
marketplace

indicated that their next mobile phone purchase will be a smartphone.⁸

Due to this anticipated increase, the mobile Web is no longer a barrier. Providing multiple ways for customers to engage is always preferred, but this component of an SMS program should not be ignored based on fears of usage across the customer base.

SMS can drive people to the mobile Web, giving marketers the opportunity to collect information on mobile landing pages or provide customers with bar codes to be scanned at point of sale. But thinking beyond coupons, the mobile Web can provide engagement and social aspects to SMS campaigns that can help the campaign grow and gain value to customers.

Example: A recent SMS/Mobile Web campaign for the Internal Revenue Service supported its Free File tax programs by asking taxpayers to text the keyword BEST to a short code to vote on their Best Free Thing in Life. The consumer clicked on a link in the text message, which launched a mobile Web site where the consumer could vote on his or her "Best Free Thing." The poll results displayed, and consumers could share their results with a friend or submit their own "Best Free Thing." Tying back to SMS, the consumer could opt-in for weekly messages that contained the user generated "best free things" entered by other participants that week. An astounding 30% of consumers chose to opt-in for the weekly messages.⁹

Small sites can support alert messaging campaigns as well. Consider regulated industries such as pharmaceutical or financial, where legal content must be displayed whenever presenting content about a brand or a condition. Alerts programs can still be sent to consumers, with links to mobile Web pages that contain the message from the brand along with legally required content.

A few things to remember:

The Third Screen is small. Make sure the mobile site is hosted with a mobile company, who can detect the correct device and operating system, and deliver the site in the right size.

⁸ Nielsen Mobile, <http://blog.nielsen.com/nielsenwire/consumer/smartphones-to-overtake-feature-phones-in-u-s-by-2011/>

⁹ Campaign was created and supported by Harte-Hanks

The site is searchable. The mobile Web has search engines, and mobile sites can appear in mobile search engines. Optimization rules are very similar to Internet Web sites.

Less technology. For now, most mobile phones cannot accommodate Flash or JavaScript, so consideration must be made for the lack of these features when creating tools or navigation schemes. Simple is best.

Mobile Applications

SMS can tie into mobile applications just as they do with the mobile Web. An SMS call to action could be a great way to link a mobile user directly to the application download, without relying on the consumer trying to find the application themselves.

SMS can also be a component of the application itself. Some applications use SMS to remind consumers to return to the application, or to provide another layer of information through alert services.

Going Forward

The mobile industry is moving quickly, and new technologies will continue to evolve. Regulations and guidelines around text messaging are likely to evolve as well, as carrier rules may change over the coming years.

It is vital to stay on top of this industry, by getting involved – join the Mobile Marketing Association, the DMA Mobile Marketing Council, and attend events that are dedicated to improving the industry.

But above all, remember that at the end of the day, the consumer will decide whether to participate and remain in mobile programs. Keep best practices in mind to get the most out of marketing investments.

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