

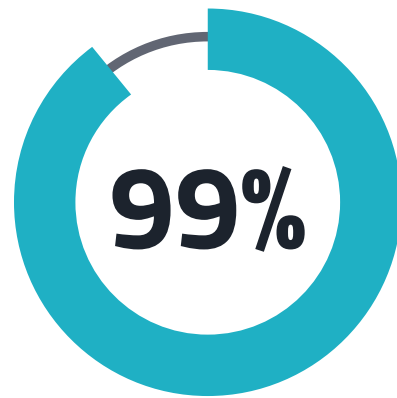
# 5 Steps to a Successful Texting Strategy



**TEXT REQUEST**  
Ignite Customer Engagement

# Why Text?

Texting is generally the quickest, simplest, and most effective way to get someone's attention. You can use this tool in so many ways to connect with customers, employees, and others to save time, complete tasks, and move your business forward. We'll show you how.



of texts  
are read



average  
response time



average ROI for  
business texting



# The 5 Steps

Texting successfully can be a walk in the park, and we'll guide you through it.

<b>01</b>	Gather Your Contacts ..... 04 Who are you going to text? Let's find out.
<b>02</b>	Create Your Business Texting Account ..... 05 Set up your office text line, users, contacts, and processes.
<b>03</b>	Pick Your Use Case(s) ..... 07 We'll cover the top eight ways businesses text.
<b>04</b>	Text Away! ..... 09 Get the dos and don'ts for great texting experiences.
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# Gather Your Contacts

You probably have a database of contacts already. A CRM, POS, email marketing, event registration, or other platform that stores customer contact info. **But how many of those contacts can you text?**



**Pro Tip:** If someone has given you their cell phone number, you have permission to text them, unless they tell you not to.

Start with your existing or active contacts—you've worked hard for them, after all. Text Request can scan your contact list to tell you which contacts have mobile phone numbers (textable), and which have landline numbers (not textable). Download your database as an Excel or CSV file, and email it into [sales@textrequest.com](mailto:sales@textrequest.com)—or to your existing account rep.

Scanned or not, you need to upload existing contacts into your business texting account. Some of [our integrations](#) will do this for you automatically, and **we're happy to personally help you get setup as you need.**

## Format Example

	A	B
1	6789997777	Andrew Swain
2	4230008888	Benjamin Barry
3	5678889876	Claire Delphy



# Create Your Business Texting Account

Obviously we want you to choose [Text Request](#), but whatever you choose, do this:

## 1. Text-Enable Your Existing Office Phone Number

This way your customers, employees, and other contacts can call or text the same number you've been promoting for years. Also helps work-life balance and team-collaboration to use your office line instead of a cell phone. Not sure if you can use your existing office landline or VOIP number? [Contact us](#).

## 2. Upload Your Contacts

You've got to have contacts to text, and the best choices are those who've already given you their info.



**Pro Tip:** Upload contacts with name, cell phone number, and other Custom Fields that may be helpful—like birthday, email address, company name, or whatever info you'll need.

TEXT OR CALL US AT  
123-456-7890





### 3. Invite Your Team

Texting is better together. You'll want others from your office to help you with communications, so add relevant employees as users. We have team-friendly features to make sure employees work in-step, and we don't limit you on users. Learn more on our [Features](#) page.

### 4. Create Message Templates

You and your team will probably be sending the same messages repeatedly. Type it once and save it as a Template to use later. This saves you time, and keeps messaging consistent across users.

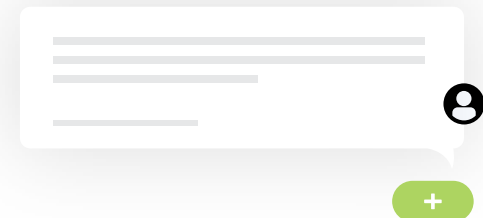
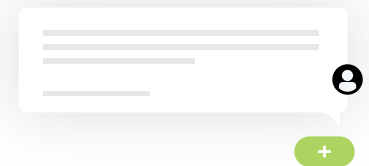
### 5. Define Your Processes

During what hours will you be texting? Who will be responsible for messages? How will it fit in your daily workflow? Each business is unique, and we're happy to talk through best practices with you—just [contact us](#)—but you've got to set your processes to text successfully.

### Bonus: Set Up Keywords







Trying to drive inbound leads or subscribers? Create a keyword to prompt opt-ins, like "Sale" for a discount code, or "Schedule" for a link to book an appointment. Keywords also auto-create contact lists with those subscribers so you can touch base with them later.

**Now you're all set to text.** Congratulations!



# Pick Your Use Case(s)

There are lots of reasons to text, and businesses typically choose one or more of these eight. For starters, pick the one that will add the most value to you or your team. Then layer in others as you get comfortable with the first.

-  **Scheduling:** Coordinate, book, confirm, remind, and keep more appointments. [Learn more.](#)
-  **Sales:** Follow up with prospects to move them through your pipeline or set up calls. [Learn more.](#)
-  **Lead Generation:** Prompt inbound texts from your website and everywhere else you market. [Learn more.](#)
-  **Customer Service:** Handle general questions and customer needs throughout the day. [Learn more.](#)
-  **Hiring & Staffing:** Touch base with candidates to set up interviews and fill jobs faster. [Learn more.](#)
-  **Internal Communications:** Better connect with employees for company updates, surveys, and more. [Learn more.](#)

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**Marketing & Promotions:** Text some or all of your customers to lift sales and sign-ups. [Learn more.](#)

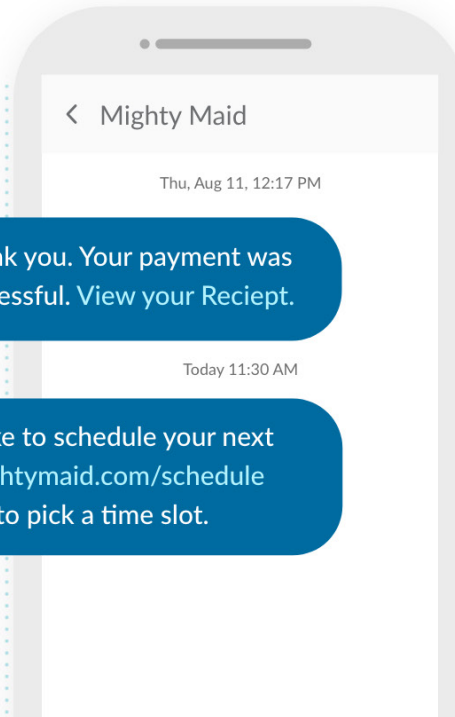


**Payments:** Request and collect payments to speed up your cash flow and increase retention. [Learn more.](#)



**Pro Tip:** Companies with the most success texting are sending messages for at least two use cases.

Need help with these use cases, or have another idea in mind? Check out our [Solutions](#), or [contact us](#) to talk through it.





# Text Away!

Go **ignite customer engagement**—and take these best practices with you.

**Do:** Tell your customers you've started texting, what you'll be texting for, and how they can get in on it. Social media, email, and press releases are great places to start, but tell them ongoing.

**Do Not:** Send super long messages. People don't want an email in another form. They like texts because they're short, quick, and convenient.

**Do:** Show your personality. No one needs another stuffy corporate communication. Let your human side or brand voice shine through.

**Do Not:** Text people who haven't given you permission to text them. Outbound texting is ideally used after opt-in, or after receiving an inbound text.

**Do:** Use pictures, emojis, and links occasionally to make your texts more engaging.

**Do Not:** Get marked as spam. Excessive emojis, dollar signs, ALL CAPS, exclamation marks, and shortened URLs are all red flags that mobile carriers pick up on.





Over time you'll create your own dos and don'ts for keeping customers engaged and your bottom line padded. We recommend sharing those with us and others to make business texting better for everyone.

Want help coming up with your texts? Check out our [database of template examples](#).

Our Spam Scanner for Mass Texts automatically alerts you if it senses any of those spam indicators we just mentioned.

### Compose a Group Message

RECIPIENTS      MESSAGE      CONFIRM

**SpamScanTR-9000™**

**⚠ Dollar signs**

**MODIFY MY MESSAGE**

**⚠ We might just have saved your bacon! The SpamScan TR-9000 found the following, potential, issues that may cause your message to be flagged by mobile carriers and not delivered:**

Dollar signs. Having a dollar sign in your email will increase your spam score. We recommend removing dollar signs from this message for maximum deliverability.

However, mobile carriers really like their secrets so we cannot guarantee SpamScan TR-9000 found everything.

Cancel Message      **CONTINUE**

# Measure and Improve

You need to track the performance and impact of your work. Texting's no different, but where you should focus depends on your use case. Common areas where businesses pay close attention to are:

**Time Saved:** How much faster are you getting responses or completing tasks compared to phone calls and emails?

**Response or Click-through Rates:** How many people get back to you? Or how many take the action you want, and how quickly?

**Revenue Earned:** What sales or services can you contribute to texting, whether texting started the conversation or helped along the way?

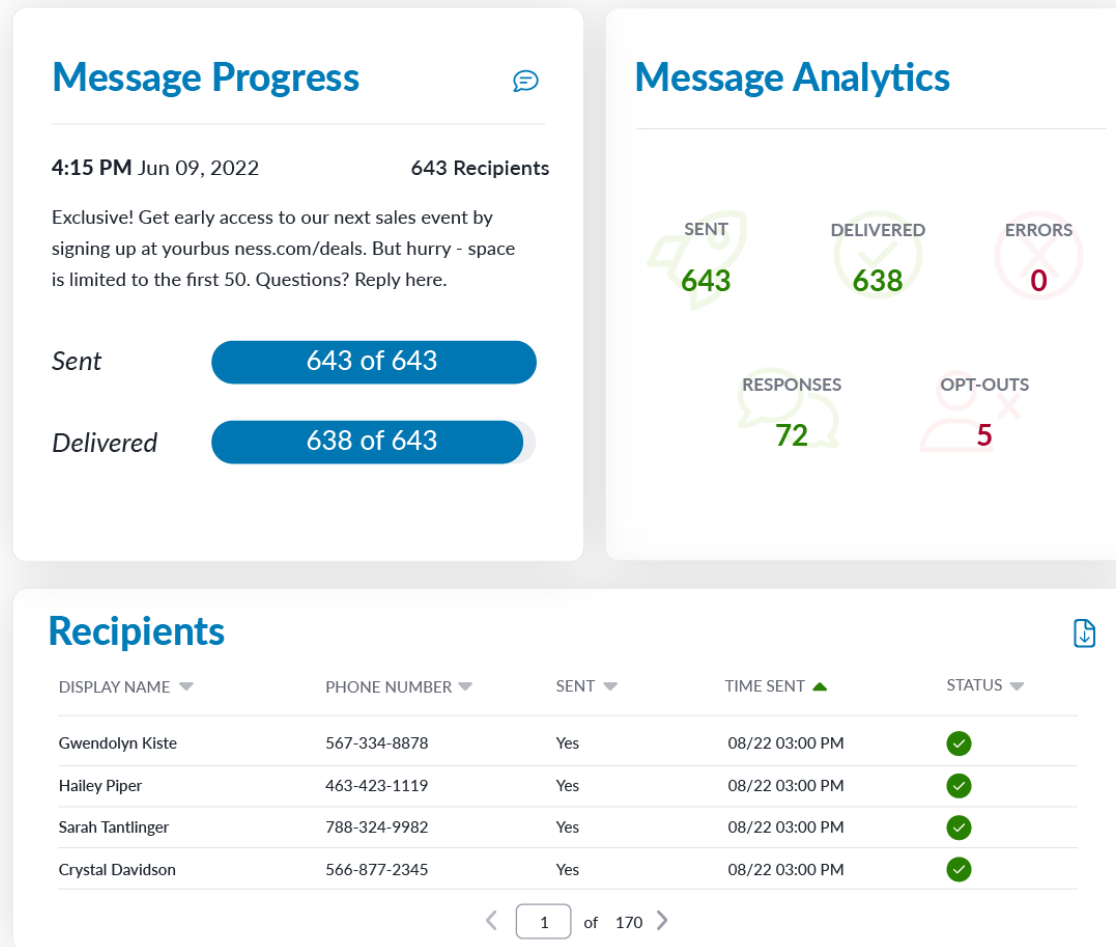
**Appointments Kept:** Appointments, classes, and meetings all equal money. How many more are you keeping on the books? How many more people are showing up to them?

**Stress Reduced:** Tougher to measure, but just as important. How much better do you or your team feel about work day-to-day?



As you get comfortable texting, look for ways to increase conversions, save time, and reduce your workload. We're happy to brainstorm process changes and best practices for doing all three. [Contact us](#), or check out our [Resources](#).

And that's that—you're now well on your way to a successful texting strategy. Congratulations and happy texting!



# Let's Grow Your Business

Text Request is the business texting platform built to ignite customer engagement. We've crafted plug-and-play messaging solutions to your everyday communication problems, so **you can cut through the noise and connect with customers anytime, anywhere.**

GET A DEMO



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TEXT REQUEST | LET'S GROW YOUR BUSINESS

# What Others Say



“With Text Request, we have a better success rate for both **capturing leads** and **providing customer service.**”

*Jeff Ludy*  
Founder and Owner  
**Houston Window Experts**



“The absolute necessity of having a good texting software is why Loud Rumor is both a partner and client of Text Request. **The customer support is non-stop.**”

*Patrick Cundiff*  
Director of Marketing  
**Loud Rumor**



“Not only is Text Request easy to test and implement, it’s also **easy for our franchisees to adopt and love.**”

*Michelle Chirco*  
Marketing Lead  
**Ziebart**

**TEXT REQUEST**



TEXT OR CALL US AT

**423-218-0111**