FREE MEMBER RESOURCE

THE AGENCY PLAYBOOK

The power of SMS marketing

How HighLevel agencies build, launch and sell text campaigns that earn 98% open rates — from A2P registration to reactivation revenue.

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The power of SMS marketing

The HighLevel agency playbook

ABOUT NEXUS HUB

Nexus Hub is the community for HighLevel agencies ready to scale, optimize and connect. Members get weekly Q&A sessions, exclusive snapshots and templates, premium partner deals, a private community and comprehensive training. This playbook is one of those resources — free, practical and written for operators. Where HighLevel agencies get unstuck.

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This ebook is for educational purposes only and is not legal advice. SMS regulations — including TCPA, A2P 10DLC and carrier policies — change frequently and vary by jurisdiction. Consult a qualified attorney before launching campaigns, and verify current carrier requirements for every client you register. Nexus Hub and the author accept no responsibility for outcomes arising from the application of this material. Results described are illustrative; your results will vary.

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What’s inside

INTRODUCTION

The channel your clients are ignoring is the one their customers actually read

You already own the tool. Every HighLevel sub-account you manage ships with a full SMS engine — two-way conversations, automation workflows, trigger links, LC Phone numbers ready to provision. Most agencies use maybe 10% of it. Appointment reminders, the occasional blast, done.

That gap is your opportunity. While your clients' competitors fight for attention in inboxes with 20% open rates and social feeds run by algorithms, a well-built text campaign lands in the one place people check within minutes — every time. SMS open rates sit near 98%, and most messages are read within three minutes of delivery. No other channel you can deliver comes close.

This playbook is written for agency operators, not hobbyists. You'll learn how to craft messages that convert in 160 characters, segment client databases with tags and smart lists so every send is relevant, navigate A2P 10DLC registration and TCPA compliance without losing a week per client, and build the automation workflows — speed-to-lead, database reactivation, missed-call text-back — that turn SMS into recurring retainer revenue.

Every chapter ends where it should: in your clients' HighLevel accounts, producing results you can put in a monthly report. At the back you'll find a swipe file of 12 ready-to-adapt message templates and a launch checklist you can run for every new sub-account.

Your clients' customers are a text away. Let's make that count.

98% SMS open rate vs ~20% for email	**3 min** Typical time from delivery to read	**100%** Of your sub-accounts already have the tools

CHAPTER 01

Understanding SMS marketing

Why SMS is the highest-leverage deliverable in your service stack — and how to position it with clients.

The channel hiding in plain sight

SMS marketing is direct, personal and absurdly effective: permission-based promotional and operational messages sent by text to contacts who opted in. There are over seven billion mobile phone users worldwide — 91% of the global population — and unlike email, texts don't sit unread. They get opened, and they get opened now.

For agencies the pitch is even sharper. SMS doesn't rely on an algorithm deciding whether your client's message gets seen, doesn't require an app download, and works on every phone with or without an internet connection. For local businesses — med spas, home services, gyms, dental practices, restaurants — it's the shortest path between an offer and a booked appointment.

And you're uniquely positioned to deliver it. HighLevel gives every sub-account a native SMS stack: LC Phone (or your own Twilio integration) for numbers and delivery, two-way conversation inbox, workflow automation, trigger links for click tracking, and reporting your client can see. The infrastructure problem is solved. What clients need is strategy, copy and compliance — which is exactly what this book covers.

FROM THE FIELD

An agency running HighLevel for a boutique clothing client built a seasonal-sale campaign: one text to the opt-in list with a unique discount code and a trigger link to the store. Result: a 35% lift in sales over the previous email-only campaign — and 60% of purchases landed within an hour of the send. Same offer, same list. Different channel.

The campaign types you'll actually deliver

Every SMS you send for a client falls into one of four buckets. Knowing which is which matters for strategy — and, as you'll see in chapter four, for A2P campaign registration.

TYPE	WHAT IT DOES	HIGHLEVEL EXAMPLE
Promotional	Drives sales with offers, discount codes, limited-time promotions	Bulk action to a smart list with a trigger link
Transactional	Confirms and reminds: bookings, payments, shipping	Appointment-reminder workflow on the calendar
Conversational	Two-way replies that qualify leads and book appointments	Missed-call text-back into the conversations inbox
Informational	Keeps contacts posted: launches, hours, events	Workflow send to tagged segments on schedule

The craft is in the mix. A list that only hears promotions burns out; a list that gets useful reminders, fast replies and the occasional strong offer stays subscribed and keeps converting.

Handling the objections you'll hear from clients

"Isn't texting customers intrusive?" Only when it's done without permission. With explicit opt-in, clear opt-out and sane frequency, customers treat texts from businesses they chose to hear from as convenient, not creepy. 75% of consumers say they're comfortable receiving SMS from brands they've opted into.

"What does it cost?" Cents per segment through LC Phone, rebillable to the client with your markup. Compared to what they spend per lead on ads, a reactivation text to contacts they already own is close to free revenue.

"We already do email." Good — keep doing it. SMS doesn't replace email; it outperforms it on speed and open rate, and the two together beat either alone. Email carries the detail; SMS carries the moment.

The numbers that sell the retainer

75%
of consumers are comfortable getting SMS from opted-in brands

19%
average SMS click-through rate — email averages 2–3%

60%
of texts are read within five minutes of delivery

25x
higher engagement than typical digital channels

Best practices follow from the numbers: time sends to business hours, keep copy tight, personalize with custom values, always include one clear call to action, lead with value, and report the metrics monthly. SMS works best woven into the client's broader funnel — nurture emails, ads and booking calendars — not bolted on beside it.

FROM THE FIELD

A gym client fighting the post-holiday slump gave their agency a list of lapsed members. The agency built a simple workflow: a personalized text offering a free training session for anyone who came back within the week. 40% of inactive members reactivated — several times what the same offer had done by email. SMS isn't just an acquisition channel; it's the best retention tool in the account.

TURN IT INTO A RETAINER

Everything in this chapter is packageable. A typical agency offer: SMS setup (A2P registration, workflows, opt-in capture) as a one-time build fee, plus a monthly retainer covering campaign strategy, copy, sends and reporting — with usage rebilled at a markup through your SaaS configuration. The client gets a channel that visibly makes money; you get recurring revenue on infrastructure HighLevel already gives you.

CHAPTER 02

Crafting compelling messages

Copy that converts in 160 characters — and the custom values and trigger links that make it scale.

160 characters is a feature, not a limit

Strong SMS copy is the highest-leverage skill in this entire playbook. You have a direct line to a customer's attention and a few seconds to use it. A well-crafted text sparks action, lands an emotion and drives a sale before the coffee gets cold. Businesses that invest in SMS copy routinely see click-through rates climb 20%+ over their earlier campaigns — same list, better words.

The constraint is the discipline. When every character costs, you cut the throat-clearing and lead with the one thing the reader cares about. That habit will improve every asset your agency writes.

The anatomy of an effective SMS

Five elements, in order: a hook that earns the next word, content stripped to its core message, one compelling call to action, honest urgency, and personalization that proves the message was meant for this reader. In HighLevel that last part is a custom value away.

```
Hey {{contact.first_name}} — your favorite sneakers are back in stock, but not for
long. Grab your size: {{trigger_link}}
Reply STOP to opt out
```

Hook, scarcity, one CTA, personalization via custom value, tracked with a trigger link, compliant opt-out. Everything in 160 characters.

Attention techniques that work in a lock screen

Power words trigger a response before the reader consciously decides to care: exclusive, limited, secret, now, ends, back. Questions pull the reader in ("Still thinking about that quote?"). Curiosity gaps tease without revealing ("We set something aside for you"). Specific numbers add credibility — "save $120" beats "save big" every time. Remember the message competes with the lock screen preview: your first six words are the whole pitch.

Persuasion without manipulation

Persuasion in SMS is about presenting a genuinely good offer in the frame that resonates: scarcity (limited spots, limited time — only when true), social proof ("Join 400 members who already booked"), reciprocity (give something first: a guide, a free assessment), authority (the practitioner's credential, the award), and continuity ("As one of our regulars..."). Manipulation gets one sale and an opt-out; resonance gets a customer.

Personalization at scale with custom values

Personalized texts convert roughly 30% better than generic blasts, and in HighLevel personalization is free: every contact field, tag and appointment detail is available as a merge field in workflows and bulk sends. The bar is not "Hi {first name}" — it's a message that reads like it was written for one person.

TECHNIQUE	IN PRACTICE
Name merge	"Hi Alex," via contact custom value — never "Dear customer"
Purchase history	"Loved your last detail? Your 3-month protection window closes Friday"
Location	Per-location offers when a client has multiple sites — segment by tag
Behavioral trigger	"You left your quote unfinished — here's 10% off if you book this week"
Dates	Birthday and anniversary workflows — set once, runs forever

CTAs that convert

The CTA is where interest becomes revenue. Be specific ("Book your slot", not "Click here"), add honest urgency ("Today only"), use action verbs (grab, unlock, claim, book), and keep it to two–four words. In HighLevel, make every CTA a trigger link: you get per-contact click tracking, and clicks can fire workflows — tag the clicker, notify the sales rep, start a follow-up sequence.

Pitfalls to write out of your drafts: slang and abbreviation soup, relentless selling with no value, sending too often, skipping proofreading (a typo'd link is a wasted send), and — never optional — forgetting opt-out language. One CTA per message. Two CTAs is zero CTAs.

Measure the words

Copy is testable. Track delivery rate, click-through on trigger links, conversion to booking or purchase, opt-out rate per send and revenue per message. HighLevel's reporting plus a UTM'd trigger link gives you all five. When a send underperforms, change one variable — hook, offer or CTA — and re-test on the next campaign. Chapter six covers the full testing loop.

Great SMS copy is craft plus feedback. Write tight, personalize honestly, give every message one job, and let the click data tell you what your client's audience actually responds to.

CHAPTER 03

Segmenting your audience for maximum impact

Tags, smart lists and workflow-driven segments that make every send feel personal.

Why blasting the whole list stops working

Your client's contact database is not an audience; it's a set of audiences. New leads, repeat buyers, lapsed customers, VIPs — each needs a different message, and each punishes irrelevance with an opt-out. Segmentation is the practice of dividing the list into groups that share something meaningful, then writing to that.

The payoff is measurable: businesses running real segmentation see engagement lifts north of 30% and conversion gains over 20% versus blast-everything campaigns. And in HighLevel, segmentation costs nothing but discipline — tags, smart lists and custom fields are already there. More relevance means more clicks, fewer opt-outs, and a list that compounds in value instead of burning out.

The four lenses

Demographic — age, gender, income, family status. Easy to collect on intake forms, but shallow on its own: knowing a contact is a 35-year-old parent tells you nothing about what she buys or when.

Behavioral — how contacts actually interact with the business: purchase history, appointment frequency, pipeline stage, engagement with past sends. This is the workhorse. First-time buyers, frequent purchasers and 90-day-silent contacts each deserve their own message, and in HighLevel each maps cleanly to a tag or pipeline stage.

Psychographic — values, lifestyle, interests. Harder to collect, powerful to use: a segment that cares about sustainability gets the eco-line message; the performance crowd gets the results message. Source it from survey responses and service selections.

Geographic — country to zip code. Essential for multi-location clients and local offers; in HighLevel, standard contact fields plus location tags handle it.

Where the data comes from

Every HighLevel sub-account is already a data-collection machine: intake and survey forms feed custom fields, the chat widget and conversations inbox capture intent in the contact's own words, calendars log appointment behavior, pipelines track deal stage, and trigger-link clicks record what each contact responds to. Add purchase data from invoices or the client's POS and you have everything a segmentation strategy needs — organized, queryable and automatable.

Turning data into segments: define the campaign goal first, pick the two or three characteristics that predict response to that goal, build the smart list, sanity-check its size (big enough to matter, distinct enough to message differently), and name it so your team knows what it means — "won-customers-90d-silent" beats "List 7".

Dynamic segmentation: let workflows do the sorting

Static segments go stale the day you build them. Dynamic segmentation moves contacts between segments automatically as behavior changes — and this is where HighLevel workflows shine. A contact clicks a trigger link: tag them "engaged" and route future offers accordingly. A customer goes 60 days without an appointment: workflow moves them to the re-engagement track. A lead's pipeline stage changes: their messaging changes with it.

Build it once per client: entry triggers on the behaviors that matter, tag changes as the action, and smart lists that read the tags. From then on, every send goes to a list that sorted itself this morning.

FROM THE FIELD

An agency managing a multi-location home-services client rebuilt their SMS program around four segments: purchase history, service area, customer lifecycle stage and engagement with previous sends. New customers got a welcome series; regulars got early access to seasonal maintenance slots; at-risk contacts got a "we miss you" offer; each location got its own promotions.

+42%	**+28%**	**−15%**	**+37%**
click-through rate	conversion rate	opt-out rate	SMS-attributed revenue

Rolling it out without drowning

Start with three segments per client, not thirteen: new, active, lapsed. Ship a campaign to each, measure, then split further only where the data says a group responds differently. Over-segmentation is a real failure mode — a dozen micro-segments you can't write distinct copy for is worse than three you can. Keep data clean (dedupe on import, validate phone fields), keep segments synced across email and SMS so the customer experience is coherent, and revisit segment definitions quarterly.

Right message, right person, right time — segmentation is how the first two happen. The next chapter makes sure you're allowed to send it at all.

CHAPTER 04

Compliance: A2P, TCPA and staying deliverable

The chapter that keeps your clients out of trouble and your messages out of the carrier's spam filter.

Why this is the chapter you can't skip

Compliance failures in SMS are not slap-on-the-wrist territory. TCPA violations carry statutory damages of $500–$1,500 per message — per message, and class actions aggregate fast. Regulators have levied hundreds of millions in penalties against businesses texting without proper consent. And beyond the law sits a second enforcement layer most marketers discover too late: the carriers. Unregistered or spam-flagged traffic simply doesn't get delivered.

As the agency, you carry this for every client. That's a burden and a moat: an agency that handles registration, consent and list hygiene properly is very hard to replace with a cheaper freelancer who doesn't.

A2P 10DLC: register before you send

In the US, all application-to-person texting over local numbers runs through the A2P 10DLC framework — and every HighLevel sub-account that sends SMS must be registered. It's a two-step process handled in HighLevel's phone settings (via LC Phone): first a **brand registration** identifying the business (legal name, EIN, address, website), then a **campaign registration** describing the use case and sample messages. Carriers assign the brand a trust score that governs message throughput.

What gets registrations rejected, in practice: a website that doesn't match the business name, no privacy policy (or one that never mentions SMS), sample messages without opt-out language, vague use-case descriptions, and opt-in flows the reviewer can't find. Get the client's house in order before you file — the checklist at the back of this book walks through it. Sole proprietors without an EIN can use the lower-throughput sole-prop registration path, but for any serious client, register the business properly.

AGENCY MOVE

Make A2P registration a billable onboarding deliverable, not a favor. You're collecting legal entity details, fixing the privacy policy, documenting the opt-in flow and shepherding a carrier review. That's real work with real value — price it, productize it, and run it from the same checklist every time.

The regulations to know

TCPA (Telephone Consumer Protection Act) is the foundation: express written consent before marketing texts, clear opt-out honored promptly, and quiet hours — no marketing sends before 8 am or after 9 pm in the recipient's local time zone. **CTIA guidelines** aren't law, but carriers enforce them like it: prohibited content categories (the "SHAFT" rules — sex, hate, alcohol, firearms, tobacco), sender identification and consent standards. **CAN-SPAM** extends to mobile commercial messages: identify ads as ads and honor opt-outs. For clients with EU contacts, **GDPR** requires freely given, specific, informed consent; **CCPA** gives California residents rights over their data. Operating in Canada? **CASL** is stricter than TCPA on consent. When a client's footprint crosses borders, get local counsel.

Consent done right

Consent means a clear, affirmative action to receive marketing texts — an unchecked box the contact checks themselves, a keyword opt-in, a form with explicit SMS language. Pre-checked boxes and "they're a customer, so it's fine" don't count. Your intake forms should say what they're signing up for: message types, rough frequency, "message and data rates may apply", and links to terms and privacy policy.

In HighLevel, bake it in: add the consent checkbox and disclosure text to every funnel form and chat-widget flow, store the timestamp and source on the contact record, and consider a double opt-in workflow — first text asks for a YES reply before marketing begins. Records matter: if consent is ever challenged, "we have the form submission, timestamp and IP" ends the conversation.

Opt-out: instant, free, honored forever

Every marketing message includes opt-out language ("Reply STOP to opt out"). HighLevel processes STOP keywords automatically and marks the contact DND for SMS — but your job is to make sure nothing routes around it: no manual sends to DND contacts, no imports that reset the flag, no workflow that texts a contact who opted out last quarter. Send one confirmation on opt-out, then silence. Opting out must cost the contact nothing and require no steps beyond one word.

List hygiene is deliverability

Carriers watch complaint and error rates per number. A dirty list — dead numbers, never-consented imports, long-silent contacts — drags trust scores down and takes deliverability with it. Quarterly: purge invalid numbers and hard errors, re-permission contacts silent for 6+ months with a single re-engagement message, and never, under any circumstances, import a purchased list. One client's bought list can poison the number you send everyone's traffic from.

COMPLIANCE AREA	STANDARD TO HOLD
Registration	A2P brand + campaign approved before the first marketing send
Consent	Explicit, documented, with timestamp and source on the contact record
Opt-out	STOP language in every message; DND honored across all workflows
Timing	Marketing sends 8 am–9 pm recipient local time only
List quality	Quarterly cleaning; no purchased lists, ever

CAUTIONARY TALE

An e-commerce company bought a phone list from a data broker, assumed consent, and blasted promotions. Recipients complained; regulators investigated and found no consent records, missing opt-out language and messages sent to people who had opted out. The bill: a multi-million-dollar fine, a class-action settlement, a 30% quarterly revenue drop from reputation damage, and a rebuilt list from zero. The "shortcut" cost more than a decade of doing it right would have.

Make compliance a system, not a memory

Run the same playbook for every client: standard consent language in a snapshot you deploy to each sub-account, a quarterly compliance audit on the calendar, opt-out spot-checks after every workflow change, team training so a VA never bulk-texts a cold list, and documented records for consent and opt-outs. When in doubt, spend an hour with a marketing-compliance attorney — it's the cheapest insurance in this industry. Compliance isn't the tax on SMS marketing; done well, it's the moat around your retainer.

CHAPTER 05

Boosting engagement, sales and retention

The automation workflows that turn SMS from a channel into a revenue system.

SMS inside the full funnel

SMS earns its keep when it's woven into the client's whole customer journey, not running beside it. Map the journey and place SMS at the moments where speed wins: the follow-up seconds after a form fill, the reminder the day before an appointment, the nudge after an abandoned cart email went unopened, the review request an hour after a great service visit. Tease a launch on social, drop the exclusive early-access link by text, follow with the detail-rich email — coordinated, each channel doing what it does best.

Keep voice and offer consistent across channels, and let data flow both ways: website behavior triggers SMS offers; SMS click data sharpens email segments. In HighLevel this is one workflow builder and one contact record — use that unification, because it's the thing point-solution SMS tools can't match.

The five workflows every client account should run

01 Speed-to-lead

New lead submits a form → text within 60 seconds, personalized, with a booking link. Leads contacted in the first five minutes convert dramatically better than those reached in an hour. This single workflow justifies the retainer for most local clients.

02 Missed-call text-back

Client misses a call → the caller instantly gets "Sorry we missed you — how can we help?" Rescues revenue that was walking to the next Google result, and starts a two-way conversation in the inbox your client's team already watches.

03 Appointment lifecycle

Confirmation on booking, reminder 24 hours out, reminder 1 hour out, no-show recovery with a rebooking link. Cuts no-show rates hard, and every message is transactional — welcome relief for the contact and the carriers alike.

04 Review request

Job marked complete → text with a direct review link an hour later, while the goodwill is fresh. Compounds the client's local SEO month over month — and it's a result you can screenshot into every report.

05 Database reactivation

The classic agency play: take the client's dormant contact list (with valid consent), send a strong time-limited offer, route replies to booking. Revenue from contacts the client already paid to acquire — often the fastest visible win in the first 30 days of an engagement.

Sequences, drips and VIP lists

Beyond the core five: a welcome series that introduces the brand and lands a first-purchase offer over the first week; post-purchase follow-ups with usage tips, a feedback ask and a complementary offer; educational drips that pay out over weeks (one benefit per message); countdown sequences building to seasonal events; and a VIP segment that gets first access and subscriber-only offers. Exclusivity is the strongest retention lever SMS has — "you're hearing this first because you're on the list" is a reason to stay subscribed.

The numbers that go in the monthly report

METRIC	WHAT IT TELLS YOU	HEALTHY SIGNAL
Delivery rate	List quality and A2P standing	95%+; falling = clean the list
Click-through rate	Copy and offer strength (via trigger links)	High CTR + low conversion = fix the landing page
Conversion rate	Bookings or purchases per send	The number the client actually cares about
Opt-out rate	Frequency and relevance health	Spike after a send = dial back or re-segment
ROI / revenue per send	Campaign revenue vs message cost	Attribute with promo codes and UTM'd trigger links

Test, refine, repeat

Treat every campaign as an experiment with one variable. Split-test send times, hooks, offer framing and CTA phrasing — HighLevel workflows can split traffic so each variant gets a fair read. Refine segments as engagement data accumulates: promote frequent clickers to a high-engagement track that can handle more frequency; move non-openers to a lighter touch. Test personalization depth, channel timing (SMS right after the email vs a day later), and new formats as carriers and HighLevel ship them. What works for the med spa will flop for the roofer — the loop is the strategy.

When things wobble

Declining engagement usually means message fatigue: vary content, deepen personalization, lower frequency for cooler segments. Deliverability dips: audit list quality first, then A2P campaign standing. Hard-to-prove ROI: unique promo codes and per-campaign trigger links close the attribution gap. Cramped by 160 characters: tighten the offer, not the grammar — or break the story across a short sequence. Integration friction with client systems: HighLevel's native integrations and webhooks cover most gaps before you need outside tools.

Run the workflows, report the numbers, keep testing. That cadence — not any single campaign — is what makes SMS the stickiest line item on your clients' invoices.

CHAPTER 06 · SWIPE FILE

12 templates ready to adapt

Drop these into workflows and bulk sends. Swap the merge fields, match the client's voice, keep the opt-out line.

01 Instant lead follow-up

SPEED-TO-LEAD

```
Hi {{contact.first_name}}, thanks for reaching out to {{business.name}}! Want to grab a time that works? Book here: {{booking_link}} — Reply STOP to opt out
```

Fire within 60 seconds of form submission. The booking link removes every step between interest and appointment.

02 Missed-call text-back

CONVERSATIONAL

```
Sorry we missed your call! This is {{business.name}} — how can we help? Reply here and we’ll get right back to you.
```

Trigger on missed call. Route replies to the conversations inbox with a notification to the client’s team.

03 Database reactivation

REACTIVATION

```
{{contact.first_name}}, it’s been a while! This week only: 20% off for returning customers. Want in? Reply YES and we’ll set you up. Reply STOP to opt out
```

The classic first-30-days win. YES replies trigger a booking workflow; confirm consent status before the send.

04 Appointment confirmation

TRANSACTIONAL

```
You’re booked, {{contact.first_name}}! {{appointment.day}} at {{appointment.time}} with {{business.name}}. Need to change it? {{reschedule_link}}
```

Send immediately on booking. Include time zone for virtual appointments.

05 24-hour reminder

TRANSACTIONAL

```
Reminder: your appointment with {{business.name}} is tomorrow at
{{appointment.time}}. Reply C to confirm or use {{reschedule_link}} to move it.
```

The C-to-confirm reply gives the client a live headcount and cuts no-shows further.

06 No-show recovery

RETENTION

```
We missed you today, {{contact.first_name}}! Things come up — grab a new time here
and we'll take care of you: {{booking_link}}
```

Send 1–2 hours after the missed slot, warm not guilt-trippy. Recovers revenue the client had written off.

07 Review request

REPUTATION

```
Thanks for coming in, {{contact.first_name}}! If we earned it, a quick review would
mean a lot: {{review_link}}
```

Send about an hour after job completion. Direct link to the Google review form — zero extra taps.

08 Flash offer

PROMOTIONAL

```
{{contact.first_name}} — 24 hours only: {{offer}}. Exclusive to our text list. Claim
yours: {{trigger_link}} Reply STOP to opt out
```

Use sparingly and honestly. Trigger link tags clickers for the follow-up segment.

09 VIP early access

PROMOTIONAL

```
You're on the VIP list, so you get it first: {{launch}} opens to everyone Friday. Get
in today: {{trigger_link}} Reply STOP to opt out
```

Exclusivity is the strongest retention lever in SMS. Reserve for the genuinely-first segment.

10 Abandoned quote / cart

NURTURE

```
Still thinking it over, {{contact.first_name}}? Your quote from {{business.name}} is
ready when you are — and here’s 10% off if you book this week: {{trigger_link}}
```

Trigger 24 hours after an unfinished quote or checkout. Pairs well with a follow-up email carrying details.

11 Birthday offer

RETENTION

```
Happy birthday, {{contact.first_name}}! Enjoy {{gift}} from all of us at
{{business.name}} — valid all month: {{trigger_link}}
```

Set once on the date custom field; runs forever. Month-long validity avoids day-of pressure.

12 Win-back before removal

NURTURE

```
Hey {{contact.first_name}}, we haven’t texted in a while. Want to keep getting
{{business.name}} offers? Reply YES to stay on the list. No reply = no more texts.
```

Send to 6-month-silent contacts before purging. Protects deliverability and re-permissions the keepers.

CHAPTER 07 · CHECKLIST

The client launch checklist

Run this for every new sub-account, in order. Print it, snapshot it, make it your onboarding SOP.

PHASE 1 Before registration

- [ ] Collect the client's legal entity details: registered business name, EIN, address, business type
- [ ] Verify the website is live, matches the business name, and lists real contact info
- [ ] Add or update the privacy policy with explicit SMS program language (data use, no third-party sharing of opt-in data)
- [ ] Document the opt-in flow: where consent is captured, exact disclosure wording, screenshots for the carrier review
- [ ] Add SMS consent checkbox + disclosure text ("Msg & data rates may apply, reply STOP to opt out") to every form and chat widget

PHASE 2 A2P registration

- [ ] Register the brand in the sub-account's phone settings (LC Phone) with the verified legal details
- [ ] Register the campaign: accurate use case, real sample messages including opt-out language, opt-in description
- [ ] Wait for approval before any marketing send — transactional testing only in the meantime
- [ ] Record the approval date, campaign type and throughput tier in your client documentation

PHASE 3 Before the first send

- [ ] Import contacts with consent records only — timestamp and source on every contact; no purchased lists
- [ ] Verify STOP/DND handling end to end with a live test number
- [ ] Configure quiet hours: marketing sends 8 am–9 pm recipient local time
- [ ] Build the core five workflows: speed-to-lead, missed-call text-back, appointment lifecycle, review request, reactivation
- [ ] Set up trigger links with UTMs and promo codes for attribution
- [ ] Send a seed test to the team: check merge fields, link targets and sender ID

PHASE 4 Ongoing (monthly / quarterly)

- [ ] Report delivery, CTR, conversion, opt-out rate and SMS-attributed revenue in the monthly client report
- [ ] Quarterly list hygiene: purge invalid numbers and hard errors, run the win-back template on 6-month-silent contacts
- [ ] Spot-check opt-out handling after every workflow change
- [ ] Review frequency per segment: opt-out spikes mean dial back or re-segment
- [ ] Re-verify compliance language on any new forms, funnels or chat flows the client adds

CONCLUSION

Ship the first campaign this week

You now hold the full stack: why SMS out-delivers every channel your clients currently pay for, how to write messages that convert in 160 characters, how to segment with tags and smart lists so every send is relevant, how to register and stay compliant so every send is deliverable, and the five workflows that turn it all into recurring, reportable revenue.

Don't try to deploy all of it at once. Pick one client. Run the launch checklist. Ship speed-to-lead and missed-call text-back in week one, a database reactivation in week two, and put the results in their next report. Then package what worked into a snapshot and roll it across the rest of your accounts. That's how a chapter becomes a service line.

The agencies that win with SMS aren't the ones with the cleverest copy — they're the ones with the most disciplined systems: consent captured properly, segments that maintain themselves, workflows that fire on time, and a testing loop that compounds. You have the platform. Now you have the playbook.